



COLUMBIA BASIN BUSINESS RETENTION AND EXPANSION PROJECT

*REPORT ON BASIN-BOUNDARY BUSINESSES
WINTER 2016*



COLUMBIA BASIN
RDI
RURAL DEVELOPMENT INSTITUTE

The Columbia Basin Rural Development Institute, at Selkirk College, is a regional research centre that supports informed decision-making through the provision of information, applied research and related outreach and extension support. Visit www.cbrdi.ca for more information.

EXECUTIVE SUMMARY

This report describes findings from a Business Retention and Expansion (BRE) survey conducted at 795 businesses in the Basin-Boundary region between 2012 and 2015. BRE is an action-oriented and community-based approach to business and economic development. It promotes job growth by helping communities to learn about concerns of, as well as opportunities for, local businesses and to set priorities for projects to address those needs.

PARTICIPATING COMMUNITIES

The distribution of BRE Pilot interviews is as follows:

| Sub Corridor | Businesses Surveyed |
|---------------------------------|---------------------|
| Castlegar and Area | 6 |
| Christina Lake and Area | 8 |
| Invermere, Canal Flats and Area | 9 |
| Creston and Area | 10 |
| Fernie and Area | 13 |
| Kettle Valley Area | 20 |
| Cranbrook and Area | 27 |
| Grand Forks and Area | 31 |
| Nelson and Area | 32 |
| Nakusp and Area | 46 |
| Revelstoke and Area | 49 |
| Kimberley and Area | 60 |
| Sparwood | 65 |
| Kaslo and Area | 80 |
| Slocan Valley Area | 81 |
| Golden and Area | 108 |
| Lower Columbia Area | 150 |
| Total | 795 |

KEY RESEARCH FINDINGS

Select survey results are summarized below.

| Survey Module | Finding |
|---------------------------------|---|
| Company Information | The highest number of respondents' businesses are classified as 'Retail Trade', 'Accommodation and Food Services' and 'Professional, Scientific and Technical Services' under the North American Industry Classification System (NAICS). Manufacturing follows closely. |
| | Market opportunities and proximity to family are the most frequently cited reasons for locating in the region. |
| | Over 37% of companies have been in business for more than 20 years. |
| | Nearly half of the companies are 'growing'. |
| Local Workforce | Survey participants provide roughly 16,000 jobs for the region's workforce. |
| | 11,800 of these jobs are full-time. |
| | Safety/First Aid/Food Safe, Sales & Marketing, Business Management, and Customer Service were most commonly listed as key training areas. |
| Sales | 36% of businesses expect that their sales will grow by between 1 and 9% over the next year; 28% expect between 10% and 24% growth in sales. |
| | Approximately 50% of businesses have the majority (over 50%) of their sales generated by their top 3 customers. <i>This question had a low response rate.</i> |
| | Most (over 70%) sales are to customers within the community or region. |
| | Computers and Office Supplies, Food, and Construction Materials are the top supplies for which business would like to find regional suppliers. |
| Facilities and Equipment | 60% of businesses own the facility in which they operate. |
| | Nearly half of businesses plan to expand within 3 years, with 88% of those indicating that expansion will occur within the community. |
| | Top barriers to expansion are financing options, lack of skilled staff, accessing new markets and lack of suitable premises. |
| Government Services | Top rated government services include water and sewage supply, telecommunications, recycling and access to highways/roadways. The lowest ratings include access to airport facilities and availability of appropriately zoned land ¹ . |
| | Access to airports, telecommunications, and availability of employment lands ² (appropriately zoned lands and buildings for lease/purchase) are the areas identified for municipal/regional government to improve. |
| Business Climate | Businesses rated the overall business climate as: Excellent or Good (42%), Fair or Poor (58%). |
| | 67% of businesses believe that the business climate will improve over the next five years. |
| | Business climate factors that received the highest ratings include Cultural and |

¹ For more information, please see the CBRDI report, "Employment Lands: Understanding Supply, Demand, & utilization of wealth generating Lands in the Columbia Basin-Boundary Region of BC, Winter 2014

² Ibid 1

| | |
|-----------------------------|--|
| | Recreational Amenities, Education (K-12 and post-secondary) Access, and Quality of Local Government. The lowest ratings went to: Housing, Local Tax Structure, and Economic Development |
| | Businesses most commonly listed Location, Lifestyle, and Sense of Community as strengths as a place to do business. |
| | The business competitiveness factors that are most important to respondents include availability of telecommunications, improvement of customer service, workplace health & safety, transportation, and workforce skill development. |
| | The top three rated economic drivers for the next five years are: tourism, attracting new residents, and technology based businesses. |
| Assessment and Plans | The overall health of their company was rated as Excellent or Good by 81% of respondents. |
| | Roughly 85% of businesses rate the risk of closing or downsizing as <i>low</i> . |

NEXT STEPS AND POTENTIAL ACTIONS

The results of this survey can be used to inform short- and long-term planning. In addition, a number of businesses would benefit from follow-up support. Taking a regional perspective, it is recommended that the regional governments, Ministry of Jobs Tourism & Skills Training, Selkirk College and College of the Rockies, the CBT and the RDI consider programming action that can facilitate effective responses at the community level. Research findings suggest that the following action areas have the greatest potential to improve the business climate:

Regional Workforce

The Basin-Boundary region hosts a population of 161,741³. The most recent release of the Labour Force Survey indicates that roughly 76,500⁴ are employed. There are roughly 16,000 employees⁵ at companies interviewed as a part of the Basin-Boundary BRE. Of these, over 11,000 are full-time jobs. The BRE surveys have covered up to 20% of employment opportunities within the Basin-Boundary region (higher ratios in the host communities).

Those businesses experiencing recruitment difficulties are looking for: sales staff, professionals, technical staff, hospitality and food & beverage staff, mechanics, skilled trades, labourers, administrative or clerical staff, machine operators, management staff, electronics workers, and construction workers. Skilled staff make up most of the surveyed workforce.

When asked about what pressures their workforce faces, employers reported that transportation, childcare, housing and cost of living were top of the list. These are the issues, outside of the employers' control, that are perceived to affect recruitment and retention, either positively or negatively, in their local workforce.

³ Source: Statistics Canada, Census 2011

⁴ Note: Figure includes imputations for those regions in Caribou and Thompson-Okanagan Development Regions

⁵ Imputed assuming normal distributions

These responses point to workforce development actions that could improve the region's skill-set and working conditions. Focused training programs may be developed to meet skills gaps. And, social programming may improve the general welfare of the workforce.

Youth Employment

The data indicates that essential employees under the age of 26 are in the minority, making up only 8% of the reported employees. Yet, this demographic represents nearly 16% of the working age population (15 to 65). Increasing youth involvement in the local workforce could be encouraged through a better understanding of the low youth employment rate, connecting local businesses with youth employment programs (federally, provincially and/or through CBT), and connecting local businesses with local schools and post-secondary institutions.

Training

A lack of technical training and colleges/universities were cited as factors contributing to a poor business climate. Businesses identified that training was needed in the areas of emerging technologies, skilled trades and health and safety. Improving technical training and workforce skill development is important for business competitiveness. Future initiatives could include supporting networks to help businesses identify shared training needs, and working with educational institutions and training organizations to ensure local skill requirements are considered in programming.

Business Growth & Expansion

49% of businesses in the region report being in the growth phase of the business life-cycle, and 49% indicate that they are planning to expand within the next three years. These investments represent roughly \$400M. Roughly 67% of those businesses planning to expand feel their existing site is adequate, and that the majority of expansion plans will occur within their current community.

Assistance could come in the form of navigating local regulations, identifying and securing new sites, and connecting businesses with resources to assist in expansion projects. Improvements could be made to have local resources approach businesses proactively to understand barriers and work collaboratively towards solutions. These potential actions and any others, should be designed to address the stated barriers to expansion which include accessing financing, lack of skilled staff, and accessing new markets.

Economic Diversification

A lack of diversification was cited one of the primary barriers to growth. Businesses identified tourism, manufacturing and technological sectors as important to attract, but also indicated that the economic drivers with the highest future growth potential are tourism, amenity migrants and technology based business. These seem well in line with one another. Actions to increase diversification could include fostering the entrepreneurial culture through workforce skills development and business management support, supporting marketing efforts aimed at high-skill amenity migrants, and helping businesses form support and collaboration networks, particularly in the manufacturing and technology sectors.

Findings indicate that the majority of supplies come from outside the local region, with only 29% of supplies sourced locally. The most cited reasons why supplies are sourced outside of the local area are: unavailability, higher costs, and quality concerns. Encouraging collaborative or cooperative buying strategies may help potential suppliers build a stronger case for locating in the Basin-Boundary.

Local businesses do not appear to engage with government procurement processes, with only 30% of businesses indicating that they have. Education and awareness of the opportunities available through municipal, regional, and provincial procurement processes could be promoted through seminars, profiles in communication material, and promotion on relevant websites.

Succession and Business Planning

Business and succession planning are critical to the health and longevity of both business and the community. Findings suggest that there are opportunities to support the business community by providing succession and business planning assistance. Open, instructive training sessions have the potential to provide a base level of support to a large number of businesses; however, given the importance of individual circumstances in business and succession planning, and a stated preference for individual coaching, a one-on-one assistance program could result in greater overall benefit by providing a higher level of support to businesses.

Government Services

A recurring theme was the lack of buildings and land available for lease or purchase. With a large number of businesses planning expansions contingent on finding new space, there is an opportunity for the local government to use the RDI's Employment Lands analysis as a basis for work with local businesses to understand existing and future business needs and assess land use planning at a micro level. Issues around the perceived lack of available land and servicing costs may be addressed through communication strategies between the local government, local businesses and the community. Opportunities may exist locally for changes to land use designations and zoning that could serve both the greater community and local businesses. Collaboration and dialogue with targeted businesses could produce valuable results and innovative solutions.

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PROJECT OVERVIEW

This report describes findings from a Business Retention and Expansion (BRE) survey⁶ conducted throughout the Basin-Boundary between 2011 and 2014. Various local government representatives and community-lead economic development groups acted as the community leads for the data-collection and subsequent action plans and programming. The Columbia Basin Rural Development Institute (RDI) provided training, data analysis and report writing support.

THE BRE CONCEPT

BRE is an action-oriented and community-based approach to business and economic development. It promotes job growth by helping communities to learn about the concerns of, as well as opportunities for, local businesses and to set priorities for projects to address those needs. Ultimately, communities will have greater success in attracting new businesses if existing businesses are content with local economic conditions and community support. Business development and job creation are key factors in fostering healthy and vibrant communities—depending on the characteristics of a community's economy, anywhere from 40 to 90 per cent of new jobs come from existing businesses.

PROJECT OBJECTIVES

Objectives of the regional BRE project were as follows:

1. Identify the needs, concerns, and opportunities of existing local businesses in order that, where appropriate, local action can be taken to respond to the businesses' needs or development opportunities;
2. Learn of the future plans of the region's businesses with respect to expansion, relocation and /or retention and follow-up where assistance can be provided;
3. Promote and support community engagement with the business community and capacity for planning and delivery of economic development programs;
4. Fill gaps in the region's economic data at a local and a regional level.

RESEARCH CONSIDERATIONS

THE BRE SURVEY

The RDI has a licence agreement with the Economic Development Association of BC for BC Business Counts, a program that provides access to an online BRE survey, contact management, and reporting system called ExecutivePulse. Data presented in this report were collected as part of a comprehensive BRE survey that is aligned with surveys conducted by other participants in the BC Business Counts program across the province of BC. Survey data can therefore be analyzed at a community, sub-regional, regional and provincial level.

⁶ Short and Long BRE survey text are available by request

The base survey, consisting of 94 questions, includes modules for company information, the local workforce, sales, facilities and equipment, and future plans for growth or succession. Based on feedback from a BRE regional advisory group, thirteen region-specific questions were appended to the base BRE survey.

THE DATA SET

To generate an initial set of potential research participants, BRE Project Leads typically worked with their local governments, Chambers of Commerce and other community level economic development practitioners (EDPs) to generate a comprehensive list of local businesses. The BRE project teams then selected businesses, initiated communications and began arranging interviews.

Businesses were typically surveyed in individual, face-to-face interviews⁷. In total 795 respondents participated in the BRE survey during the pilot period (2012 – 2015). The number of respondents to each question varied. Some communities chose to administer only the standard BRE survey, some a truncated version of the BRE survey, while others administered the RDI add-on survey. Further, some respondents chose not to answer certain questions.

DATA COLLECTION

The community level BRE project teams of trained researchers were responsible for the entire survey process. This included arranging and undertaking the structured interviews which took between 1 to 1.5 hours, plus data entry. In total the process took approximately four hours per business.

DATA INPUT, ANALYSIS AND REPORTING

Data was entered into the ExecutivePulse system by the community level BRE project teams immediately following the interviews. To ensure confidentiality and data security, company-level data was only made accessible to RDI staff and the community level EDPs, all of whom signed confidentiality agreements.

Quantitative data were analysed using descriptive statistics and qualitative data were analysed using the grounded theory method of generating key coding themes. Based on the results of data analysis activities, an initial set of recommendations was generated by RDI and then reviewed with the community level BRE project teams. Findings and related recommendations were assembled into this report by RDI researchers.

⁷ One community used an on-line distributed survey for additional data collection.

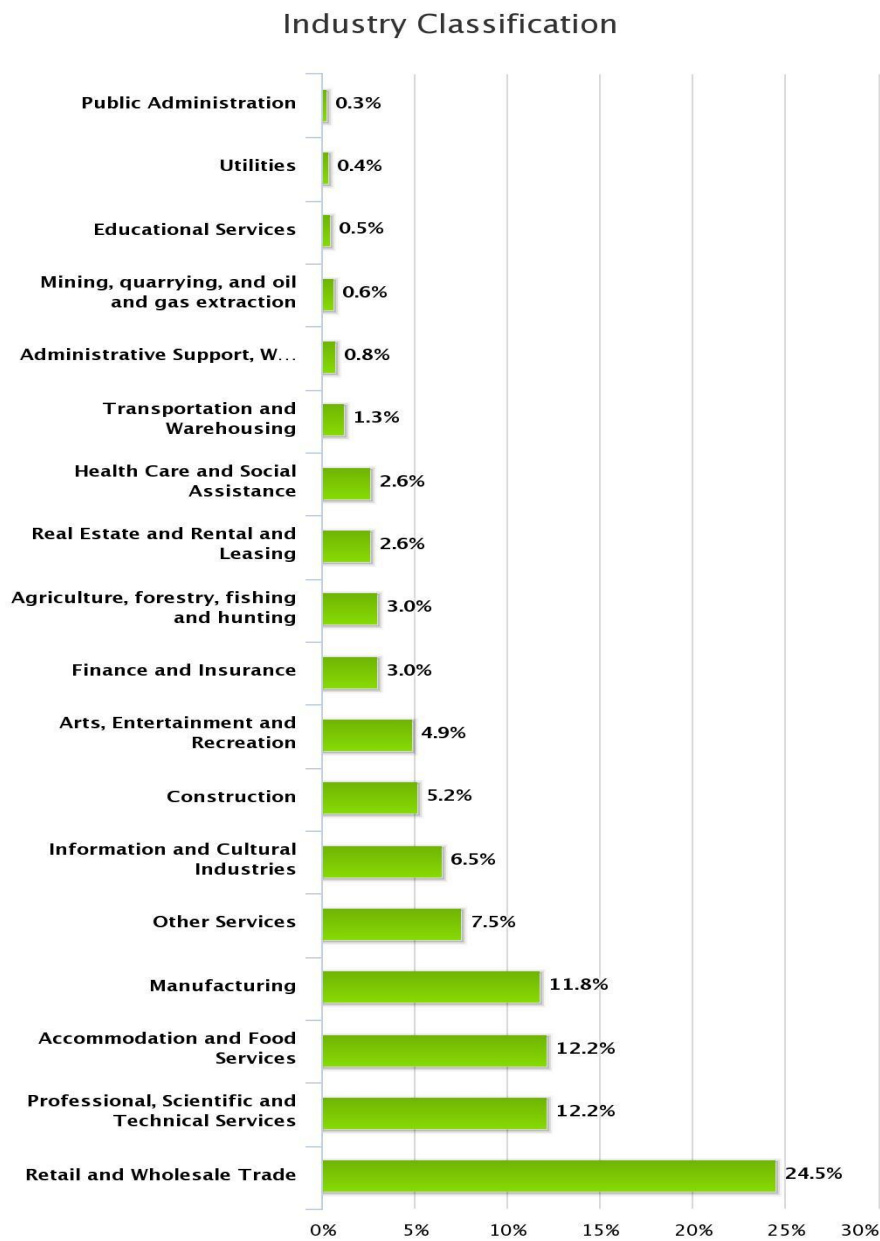
RESEARCH FINDINGS

COMPANY INFORMATION

Type of Product/Service Offered

Businesses interviewed represent a diverse cross-section of industries. Most common are Retail and Wholesale Trade (24.5% or 195 respondents), Professional, Scientific and Technical Services (12.2% or 97 respondents), and Accommodation and Food Services (12.2% or 97 respondents).

Figure 1: Industry classification

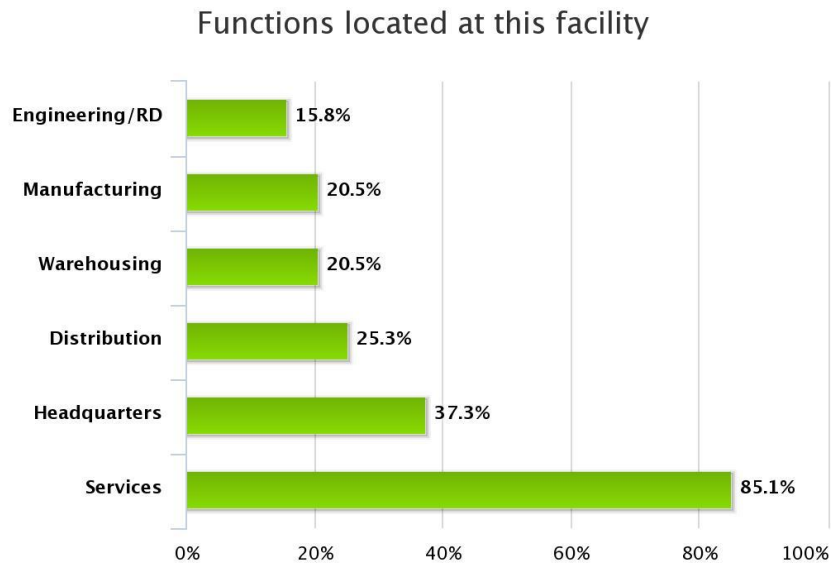


Note: 795 respondents

Facility Function

The majority of respondents (85% or 410 respondents) indicated that their facility provides services. Other primary functions include headquarters (37% or 180 respondents) and distribution (25% or 122 respondents). Fewer respondents indicated that their facility serves as warehousing, engineering/R&D or for manufacturing purposes⁸.

Figure 2: Facility function(s)

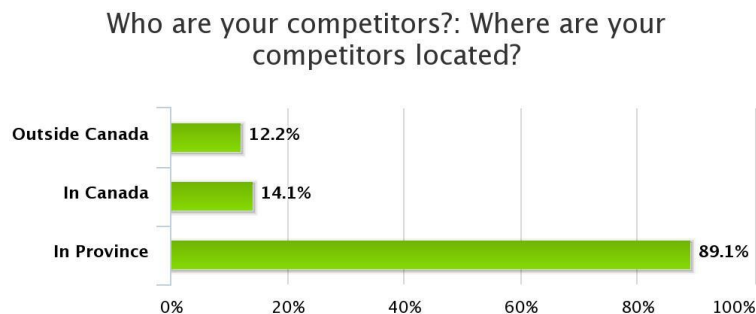


Note: 485 respondents

Competition

The vast majority of competition (89 % or 139 responses) reported was coming from within the province.

Figure 3: Location of primary competitors



Note: 159 respondents

⁸ Note: Where percentages add up to more than 100%, respondents have given more than one response.

Factors for Success

Figure 4: Factors for Success: Key Words



When asked what factors made their company successful in this region, the highest number of respondents (13% or 86 businesses) cited Quality of Service or Product. Customer Service (13% or 85 businesses), Location (11% or 74 businesses), and Reputation (6% or 38 businesses) were also discussed frequently.

“Culture in Nelson, local support, remoteness; contributes to self-reliance for culture and entertainment.”

“People are willing to support local product.”

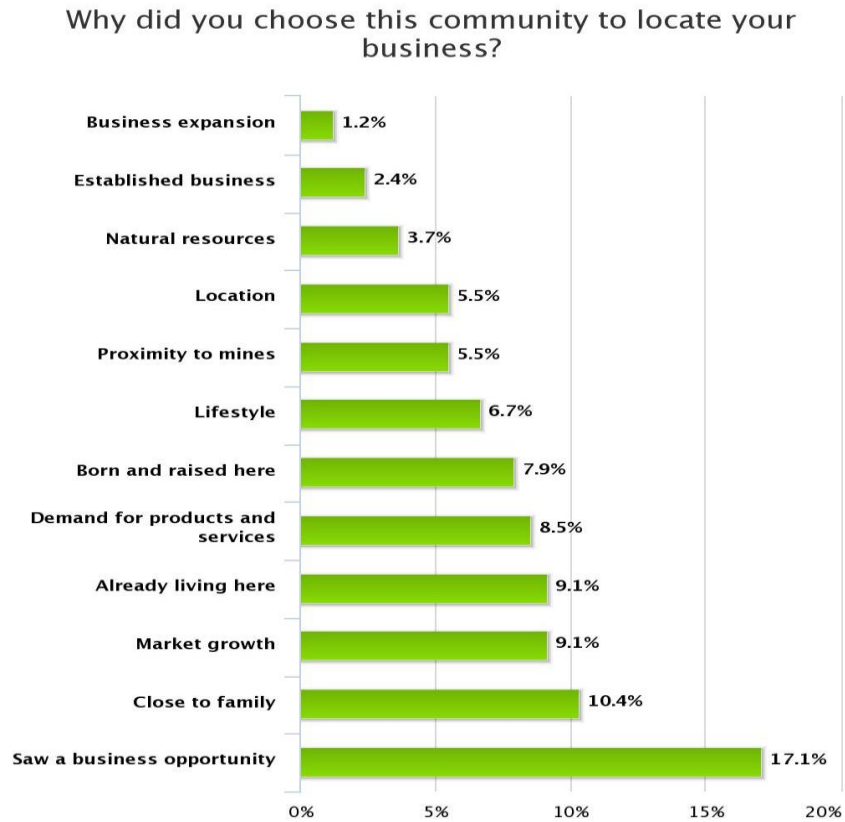
“Businesses are interdependent in this community. Work closely with other companies and work with the mine. Family-based business, has gained trust from the community and grown with the community.”

“The pristine environment makes retreat experiences positive. Economically more viable to operate a business here due to low real-estate prices and lower overhead costs.

Choosing a Community

The market opportunities (17% or 28 respondents) and close to family (10% or 17 respondents) were the most frequently cited reasons given for businesses to locate in their community.

Figure 5: Why did you choose this community to locate your business?

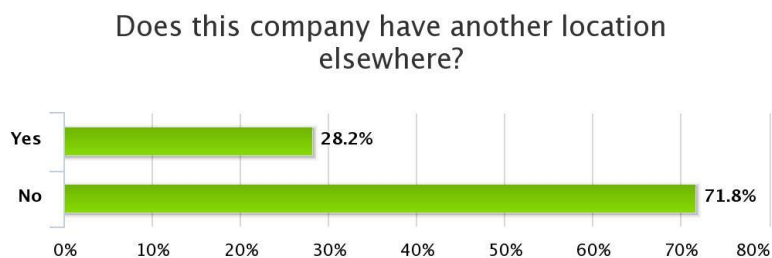


Note: 143 respondents

Other Locations

28% of respondents (149 respondents) indicated that their company has other locations.

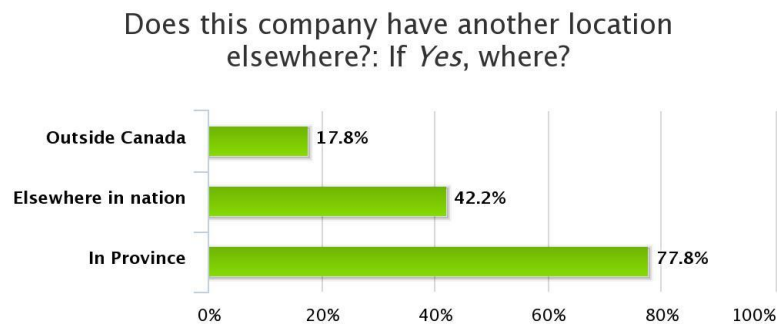
Figure 6: Other Locations



Note: 528 respondents

78% of those businesses (35 respondents) have their other locations in other areas of the province, 42% (19 respondents) have other locations in other parts of Canada and 17% (8 respondents) indicated that their company has another location outside of Canada.⁹

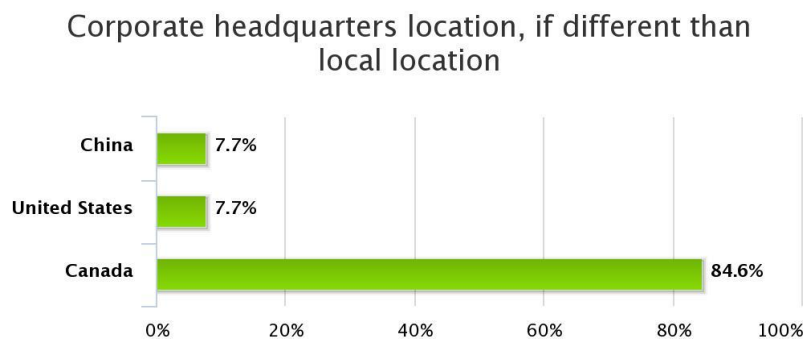
Figure 7: Other Locations



Note: 62 respondents

Of the businesses whose headquarters are *not* local (13 in total), 85% (11 businesses) of respondents reported that their headquarters are located in Canada, 8% (1 business) indicated that they are headquartered elsewhere in the United States and one in China.

Figure 8: Location of headquarters



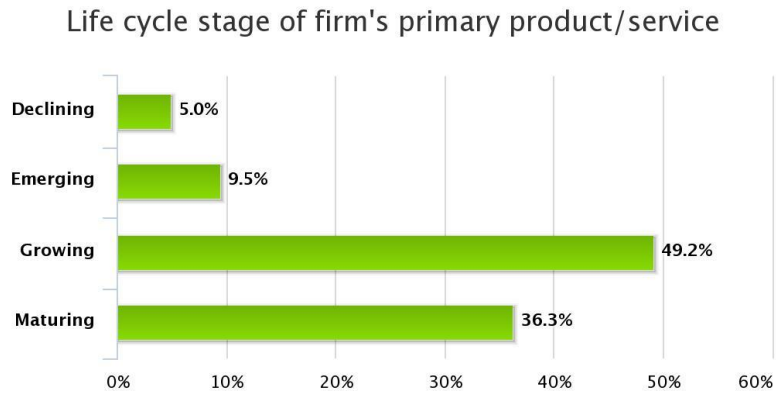
Note: 13 respondents

Age and Life Cycle Stage

Nearly half of respondents (49% or 373 respondents) reported that their business is in the 'growing' life cycle stage. Another 36% (275 businesses) indicated that their business is in the 'maturing' stage. Only 10% (72 businesses) indicated that they are in the 'emerging' stages, and 5% (38 businesses) indicated that they were declining.

⁹ Responses reflect that respondents can have other locations in more than one other location. Therefore total number of other locations exceeds number of respondents.

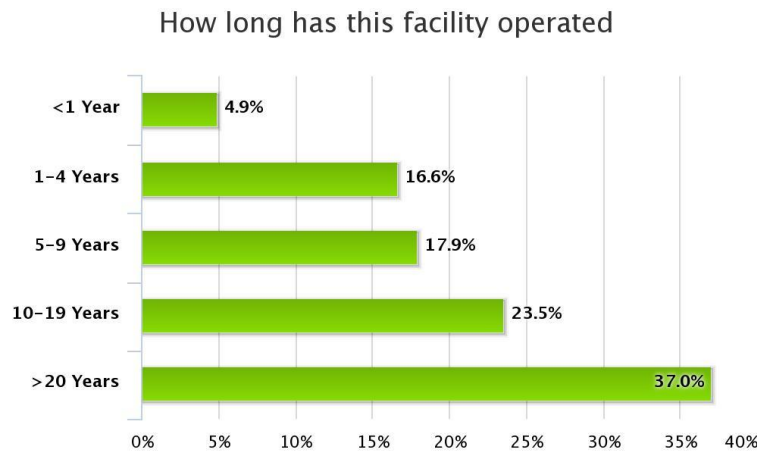
Figure 9: Life cycle stage



Note: 758 respondents

Many businesses (285 respondents or 37%) reported that they have been in business for more than 20 years. A significant number have reported that they have been in business for 10 – 19 years (181 respondents or 24%), 5 – 9 years (138 respondents or 18%), 1-4 years (128 respondents or 17%), and less than one year (38 respondents or 5%).

Figure 10: Length of time in business



Note: 770 respondents

Ownership and Management

Most respondents (400 respondents or 51%) indicated that their business is classified as a corporation, while 28% (220 respondents) indicated that they are a sole proprietorship. The remainder of businesses are registered as a partnership (81 respondents), non-profit (32 respondents), limited liability partnership (25 respondents), or other type of business (19 respondents).

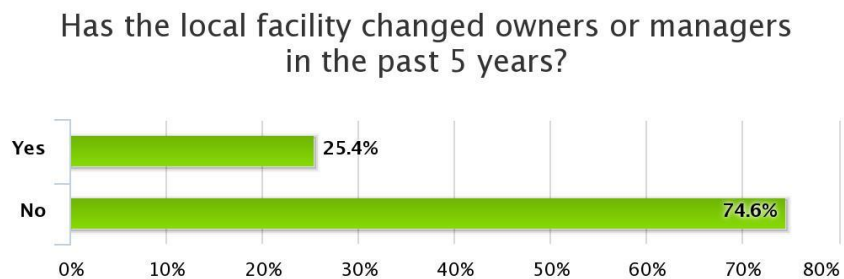
Figure 11: Type of business



Note: 777 respondents

75% of businesses (514 businesses) have not seen a management or ownership change in the last 5 years, while 25% of businesses (175 businesses) have. 125 businesses (16%) are expecting an ownership change in the near future. Of the respondents that have seen changes in management and/or ownership, 80% (135 businesses) report that change has had a positive impact.

Figure 12: Ownership and management changes in last 5 years

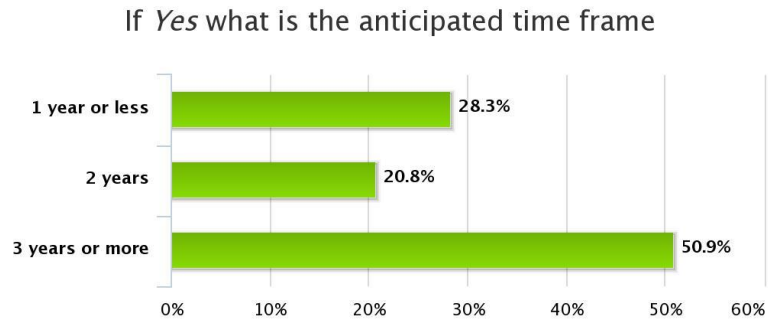


Note: 689 respondents

Succession and Business Plans

Of the 125 businesses that responded and reported a pending ownership change, half expect the change to take 3 years or more, the remainder expect a more immediate change.

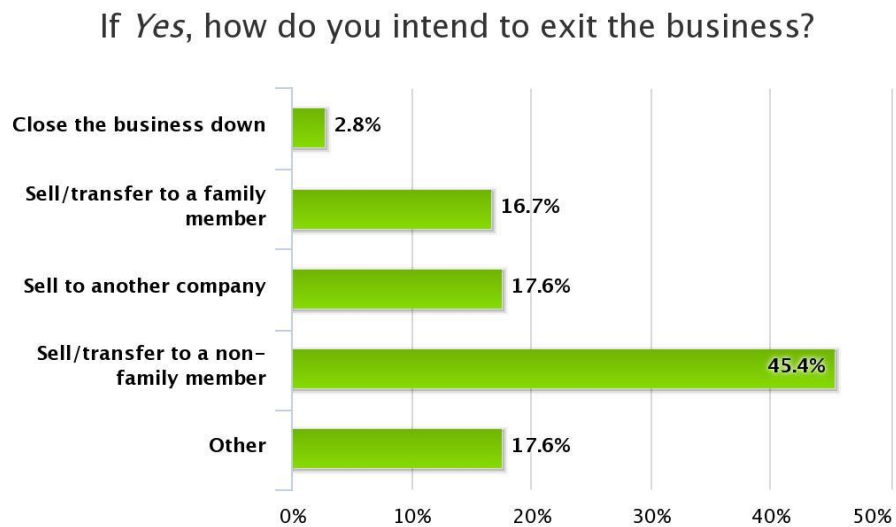
Figure 13: Anticipated timeline for ownership change



Note: 106 respondents

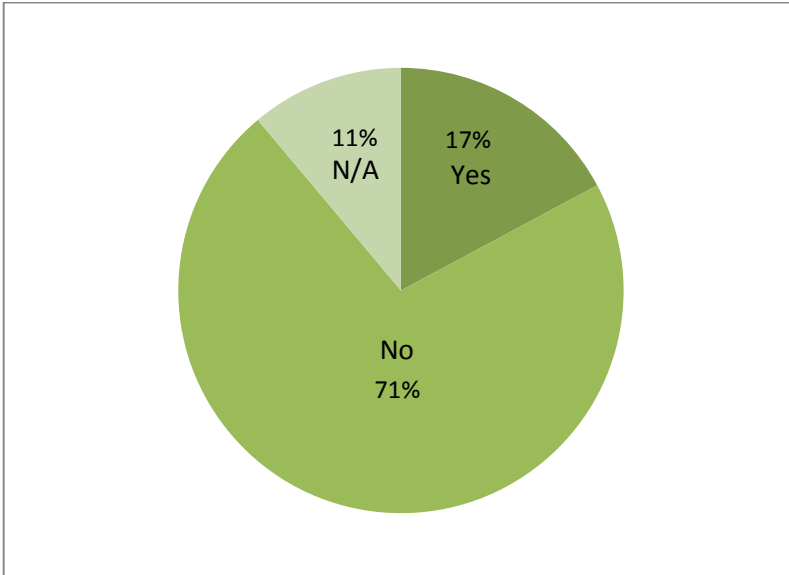
63% of respondents (68 respondents) expect that the current owner will exit the business by selling it to a non-family member or to another company, while only 17% (18 respondents) expect it to be sold/transferred to a family member.

Figure 14: Anticipated exit strategy



Note: 108 respondents

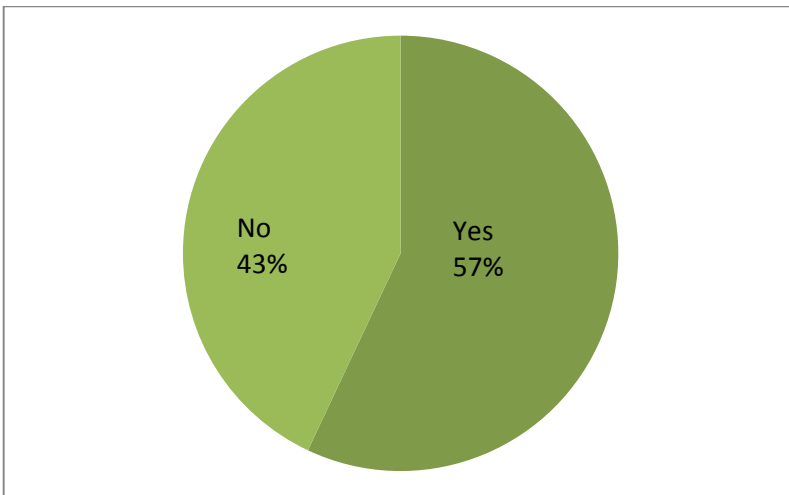
Figure 15: Existence of formal succession plan



Only 17% of respondents (114 respondents) indicated that they have a succession plan in place.

Note: 655 respondents

Figure 16: Existence of current business plan



57% of respondents (383 respondents) indicated that they have a current business plan in place.

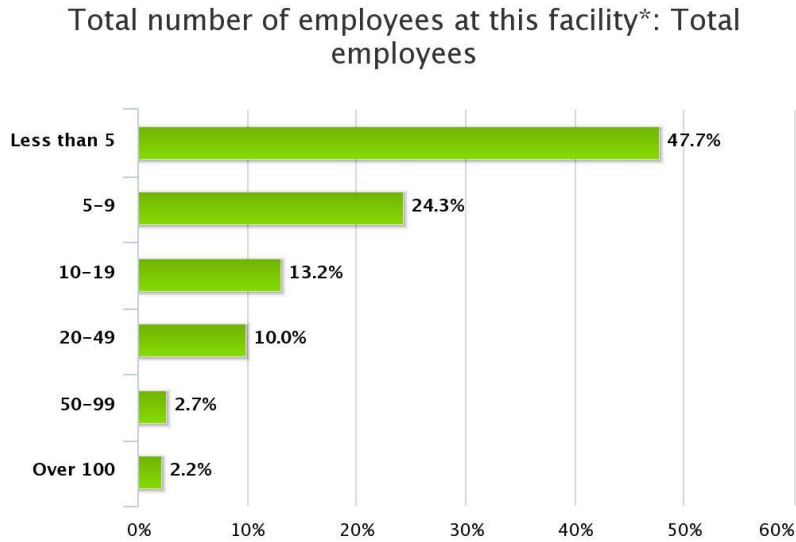
Note: 676 respondents

LOCAL WORKFORCE

Size of Workforce

The 782 businesses interviewed reported a total of 16,056 employees. 48%, or 373 of the businesses surveyed indicated that they have fewer than five employees, and just 2%, or 17 of the businesses indicated that they have over 100 employees.

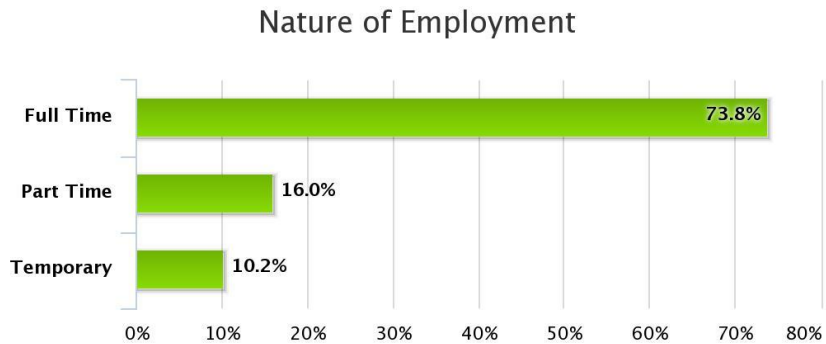
Figure 17: Total number of employees



Note: 782 respondents

74% (11,844) of employment positions at surveyed businesses are full-time, while only 16% (2567) are part-time and 10% (1645) are temporary.

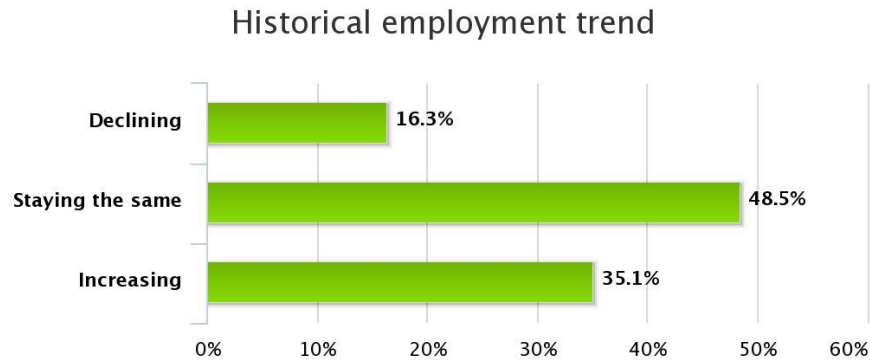
Figure 18: Nature of employment



Note: 782 respondents

84% of respondents (569 businesses) indicated that the number of employees at their business has increased (35% 239 businesses) or stayed the same (49% 330 businesses). Only 16% (111 businesses) indicated a decrease. This may be a reflection of an aging workforce and increased retirements.

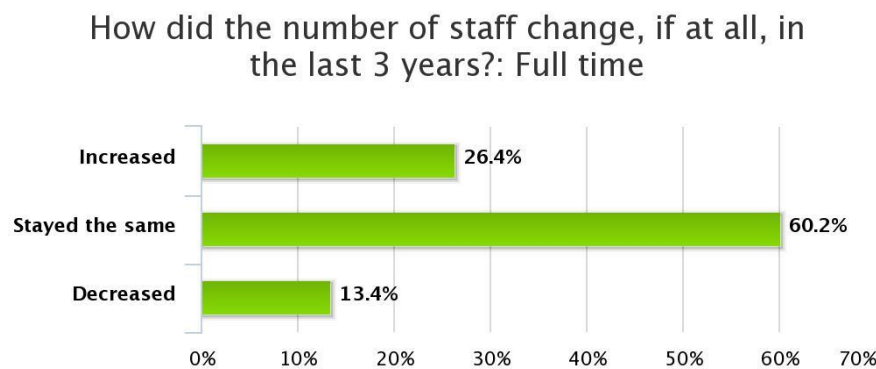
Figure 19: Historical Employment trend¹⁰



Note: 680 respondents

The last three years has seen increased growth, with 26% of businesses (173 respondents), or stability, 60% (394 respondents), in the size of the full-time workforce over the last three years.

Figure 20: Full-time employment trend over last 3 years

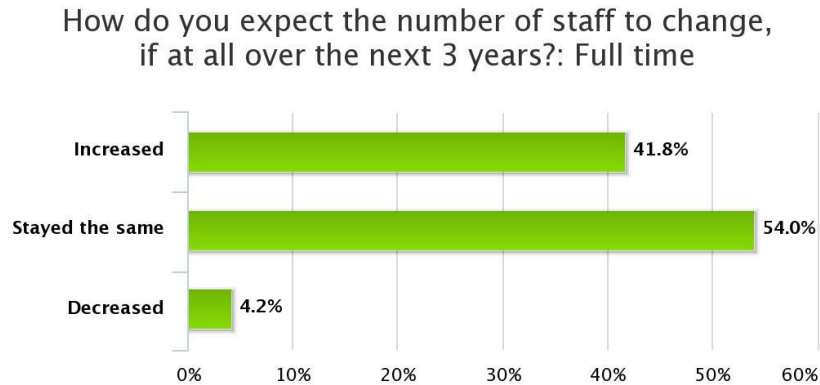


Note: 655 respondents

42% of businesses (266 respondents) project growth, and 54% (344 respondents) project stability in their full-time workforce over the next 3 years. 4% (or 27 respondents) of businesses indicated they expected a decrease over the next 3 years.

¹⁰ The question considered a 10 year historical trend.

Figure 21: Full time employment trend over next 3 years

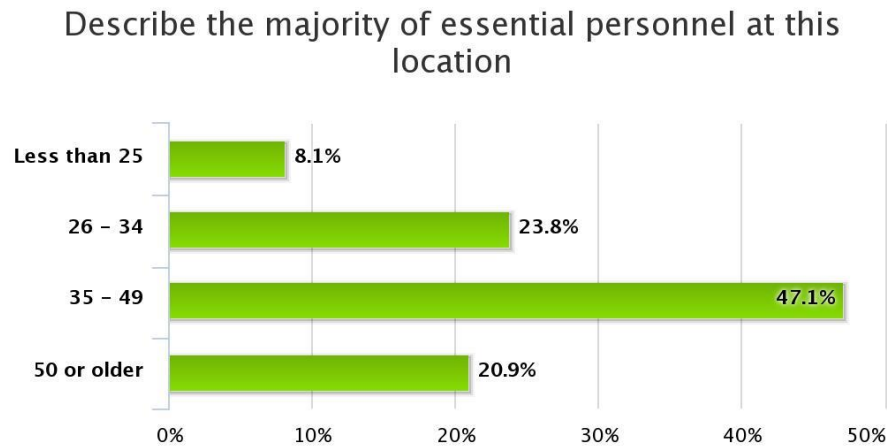


Note: 637 respondents

Workforce Demographics

Of the responses received, 47% (313 responses) indicated that the majority of their essential employees are between 35 and 49 years old. 24% (158 responses) indicate the majority is between 26 and 34 years of age, and only 8% (54) indicate the majority are under 25 years old. , 21% (139) indicate the majority of their essential personnel are close to retirement (over 50 years of age).

Figure 22: Age of the majority of essential employees



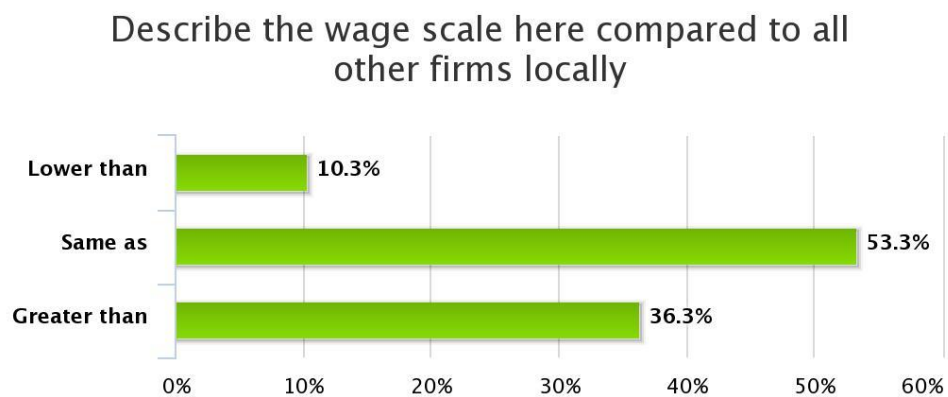
Note: 664 respondents

Wages

When reporting on average wages for skilled or professional workers, 33% of businesses (152 responses) indicated they pay between \$20 and \$29 per hour. The most commonly reported average wage for semi-skilled workers (28% or 105 businesses) was between \$15 and \$19 with an equal number reporting wages between \$20 and \$29 and the most commonly reported average wage for entry-level workers (50% or 146 respondents) was \$10 to \$13.

53% of respondents (295 respondents) reported that their wage scale is similar to other businesses in the region.¹¹

Figure 23: Wages in relation to other businesses in the region

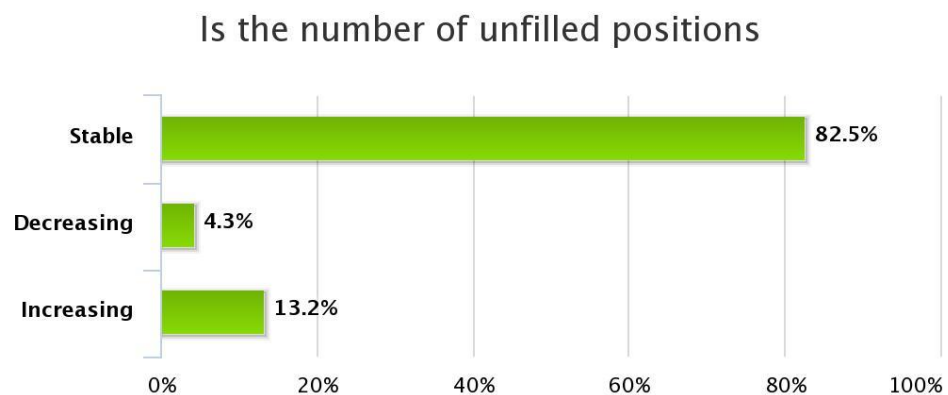


Note: 553 respondents

Recruitment and Retention

Of those businesses that responded, 83% (462 respondents) indicated that the number of unfilled positions at their company would remain constant.

Figure 24: Trend in unfilled positions



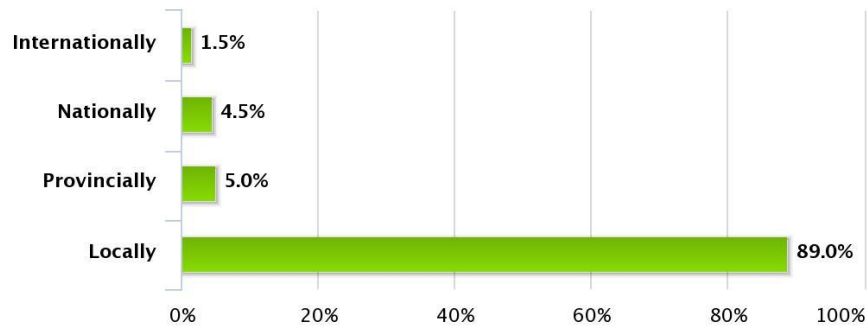
Note: 560 respondents

The majority of respondents (89% or 638 respondents) reported that they primarily recruit employees from local labour markets. 4% (32 respondents) recruit nationally, while 5% (36 respondents) report that they recruit provincially, and 2% (11 respondents) reported international recruitment.

¹¹ Detailed wage data is found in Appendix A.

Figure 25: Location of workforce recruitment

Where does the company attract the majority of its workers from?



Note: 717 respondents

Of 694 respondents, 46% (317 respondents) reported recruitment challenges; 52% expect future challenges. Of 683 respondents, 31% (209 respondents) indicated that they have experienced retention challenges.

Figure 26: Recruitment activities



Note: 376 respondents

Figure 27: Retention challenges



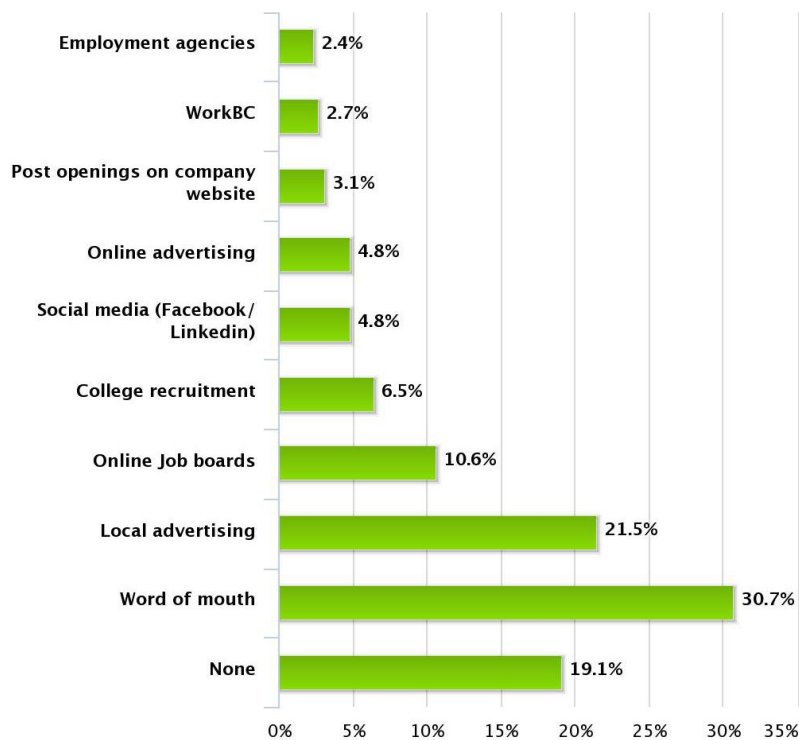
Note: 422 respondents

When asked what efforts their business has undertaken to retain employees, 422 businesses responded. The most frequent response was to provide competitive wages (24% or 68 respondents). Providing benefits (21% or 58 respondents), supporting a positive work environment (20% or 57 respondents) and offering flexible work schedules (18% or 51 respondents) were other strategies employed. Other factors cited by businesses include offering bonuses (15%) and skills training (12%).

When asked what efforts businesses have undertaken to recruit employees, the most-cited activities were: word-of-mouth (31% or 90 respondents), local advertising (22% or 63 respondents) and online job boards (10% or 31 respondents). Respondents also cited using college recruitment fairs, social media, online advertising and postings on the company web-site.

Figure 27: Recruitment Activities

If applicable, please describe any recruitment activities or strategies you have undertaken to attract employees.

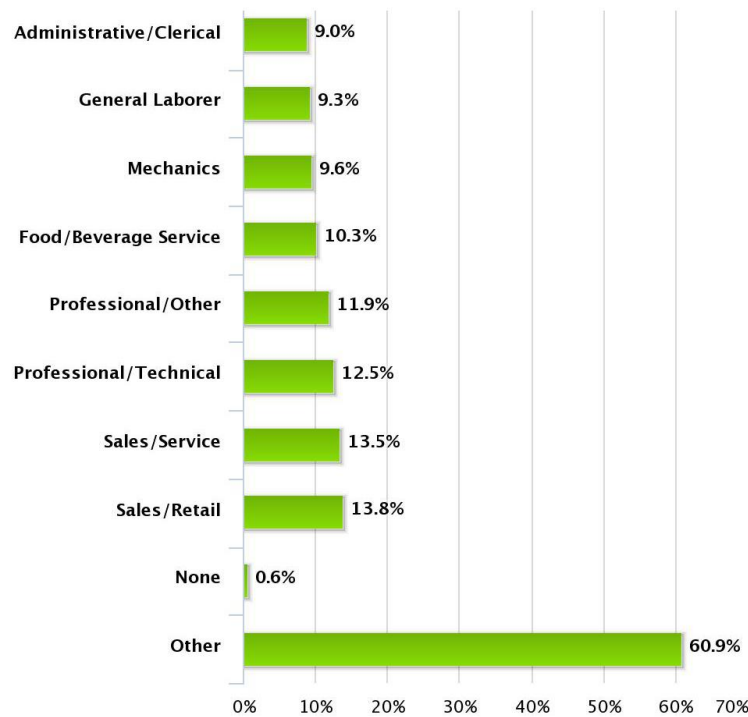


Note: 376 respondents

Of the 317 companies that indicated they were experiencing recruitment challenges, the areas currently in focus include: retail and service sales (27% or 85 respondents), professional or technical (24% or 76 respondents), food and beverage service (10% or 32 respondents), mechanics (10% or 30 respondents), general labourers (9% or 29 respondents), and administrative or clerical positions (9% or 28 respondents). The most significant responses included in the 'other' category include: skilled trades (9% or 29 respondents) and managers (7% or 22 respondents).

Figure 28: Current recruitment areas

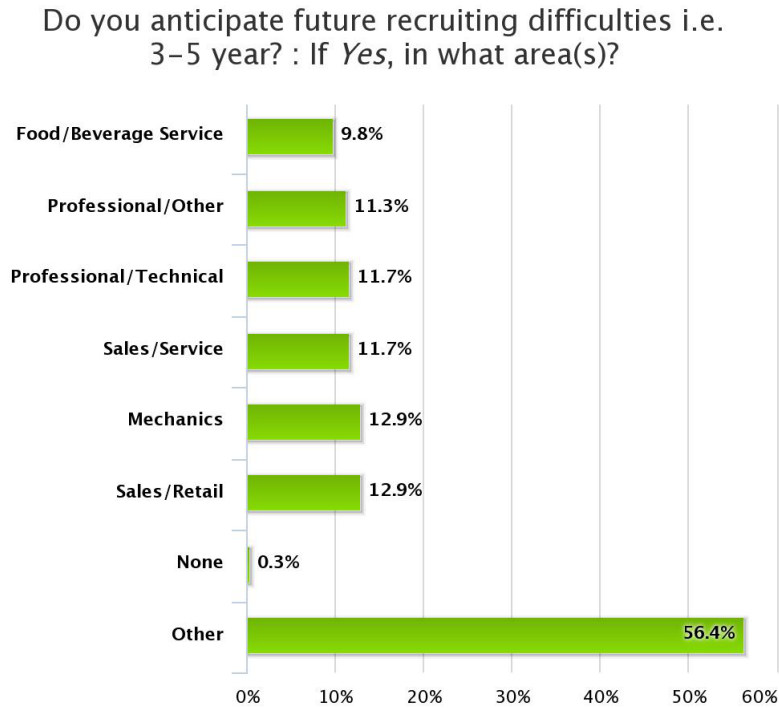
Is the company experiencing recruitment problems with any employee positions or skills?: If Yes, in which category(s)?



Note: 317 respondents

52% of respondents (350 respondents) anticipate future recruitment difficulties. The most commonly anticipated recruitment challenges include: retail and service sales (24% or 80 respondents), mechanics (13% or 42 respondents), professional and technical positions (23% or 75 respondents). The most significant response included in the 'other' category was skilled trades (8% or 27 respondents).

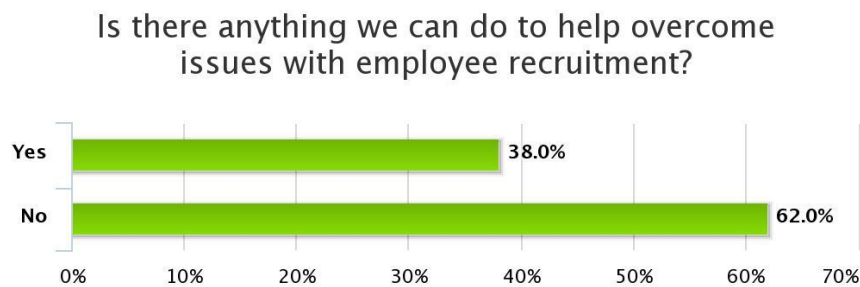
Figure 29: Future areas where recruitment may be challenging



Note: 350 respondents

38% of respondents (57 respondents) indicated that they believed that there were strategies that could be undertaken by external stakeholders (municipal governments and regional support organizations) to address employee recruitment, however, few suggestions were made regarding the nature of these strategies. Suggestions included: establishing a job bank (27% or 11 respondents), providing training support (17% or 7 respondents) and help with foreign worker program (10% or 4 respondents).

Figure 30: Help with recruitment challenges

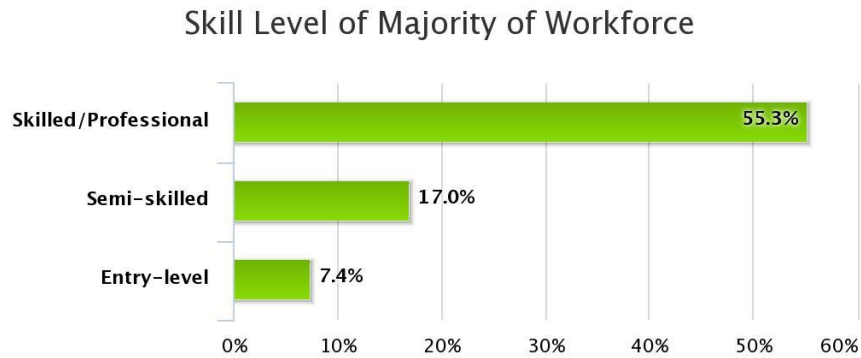


Note: 150 respondents

Skills and Training

The majority of respondents (55% or 368 respondents) indicated that the majority of their workforce is comprised of skilled or professional workers, 17% indicated that their workforce is mainly semi-skilled workers and 7% indicated that entry-level workers make up the majority of their workforce.

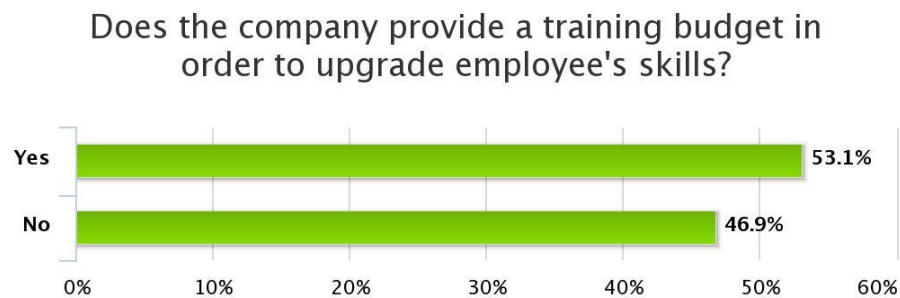
Figure 31: Skill level of majority of workforce



Note: 530 respondents

53% (358 businesses) indicated that there is a training budget to upgrade employee skills. 85% of those (135 businesses) indicated that their company offers in-house training and 39% (61 businesses) use contracted training.

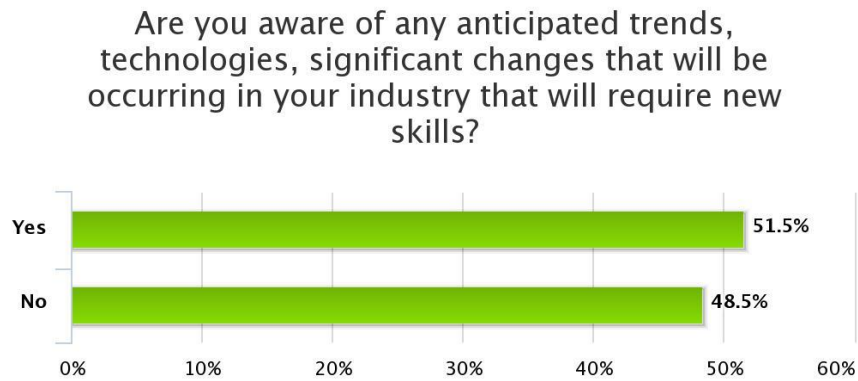
Figure 32: Training Budget



Note: 674 respondents

52% of respondents (340 businesses) indicated that they were aware of trends, technologies, and other significant changes that will be occurring in their industry that will require new skills.

Figure 33: Awareness of any anticipated trends, technologies, significant changes that will be occurring in your industry that will require new skills



Note: 660 respondents

72% or 494 respondents indicated that there are areas of training or professional development that would benefit their employees. Most commonly listed among these areas were First Aid/Food Safe/Safety training (16% or 76 businesses), sales and marketing (15% or 72 respondents) and business/management training (14% or 70 businesses).

Figure 34: Training or professional development needs



Note: 486 respondents

When asked what new training might need to be considered in the next five years, the most commonly cited response was emerging technologies (15% or 14 businesses). Other areas where training will be needed include online marketing (13% or 12 businesses), technology skills, computer training, solar technologies, social media and electronics.

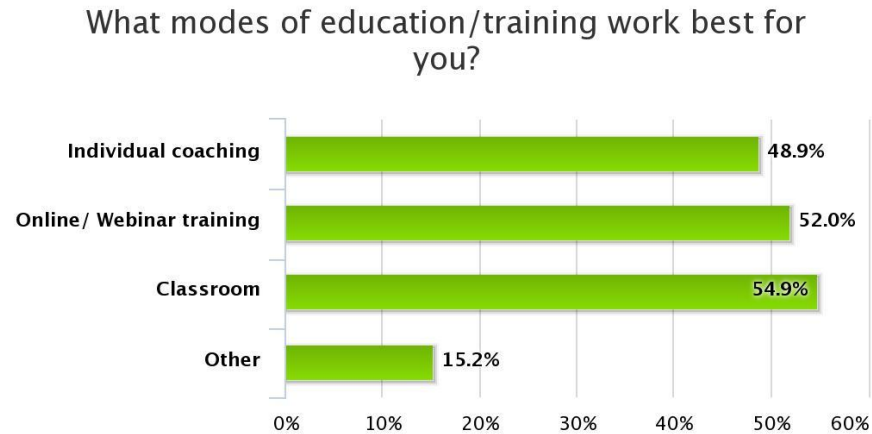
Figure 35: Areas for new Training in next five years



Note: 96 respondents

55% of respondents (350 respondents) stated that they prefer training when it is delivered in a classroom, while 52% (332 respondents) preferred online or a webinar style format, and 49% (312 respondents) expressed a preference for individual coaching. Other training formats that people mentioned include: in-house workshops (9% or 56 respondents), conferences (5% or 35 respondents) and mentorships (1% or 6 respondents).

Figure 36: Preferred modes of training



Note: 638 respondents

52% of respondents (309 businesses) typically seek training opportunities that are offered locally, and 37% (223 businesses) travel to other areas in BC, 27% (158 respondents) look regionally, 18% (105 respondents) will look nationally, and 12% (72 respondents) cross the border to the United States.

Figure 37: Usual training locations



Note: 595 respondents

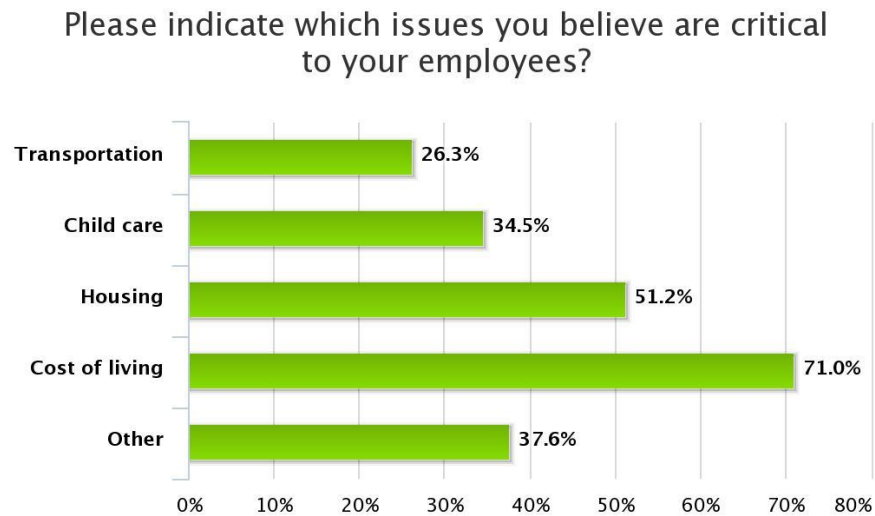
Unions

Only 40 businesses (6%) reported that they have union status.

Employees

The most frequently cited challenges for employees is cost of living (71% or 319 respondents), housing (51% or 230 respondents), child care (34% or 155 respondents) and transportation (26% or 118 respondents).

Figure 38: Critical considerations for employees



Note: 449 respondents

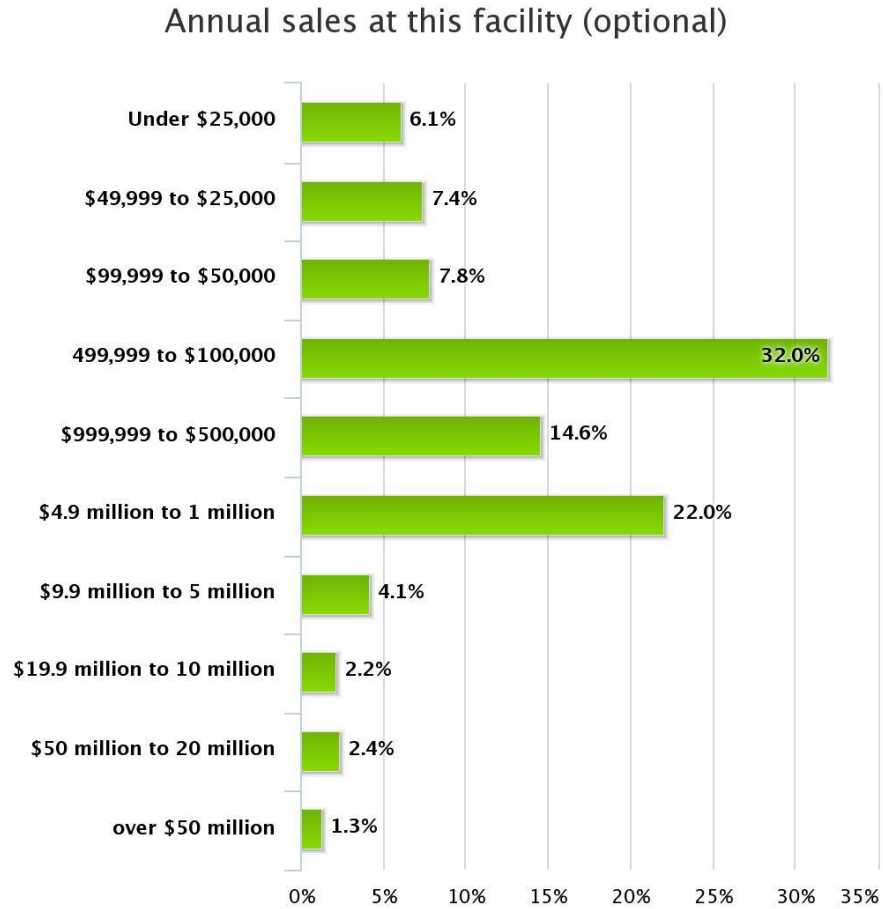
88% of businesses (424 businesses) interviewed reported that over 75% of their employees live within the community, 3% (13 businesses) indicated that 75% of the employees live elsewhere in the region and 1% (7 business) indicated that the majority of their employees live outside of the region.

SALES

Market Size and Share

The highest number of respondents (147 businesses or 32%) reported annual sales between \$100K and \$500K. The second highest number of respondents (101 businesses or 22%) reported annual sales between \$1M and \$5M. Interestingly, \$500K is roughly the median level of sales for the region; this means that roughly half of the businesses surveyed had revenues below \$500K and the other half had revenues over \$500K.

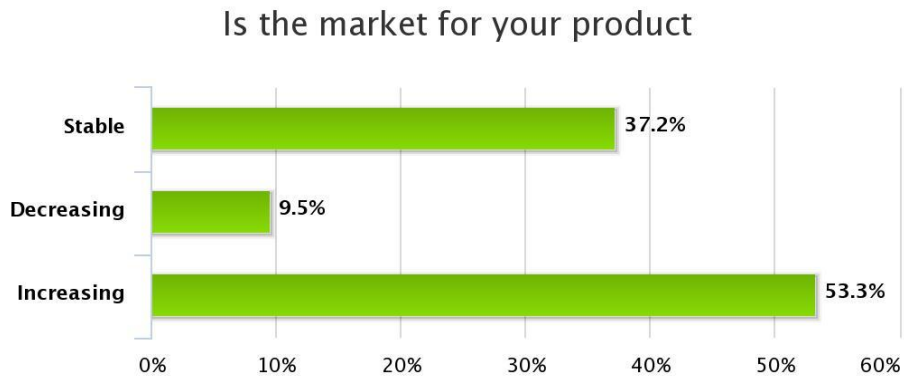
Figure 39: Annual sales



Note: 459 respondents

The majority of businesses interviewed (53% or 410 businesses) indicated that the size of the market for their product or service is increasing. Another 37% (286 businesses), reported that the market is stable.

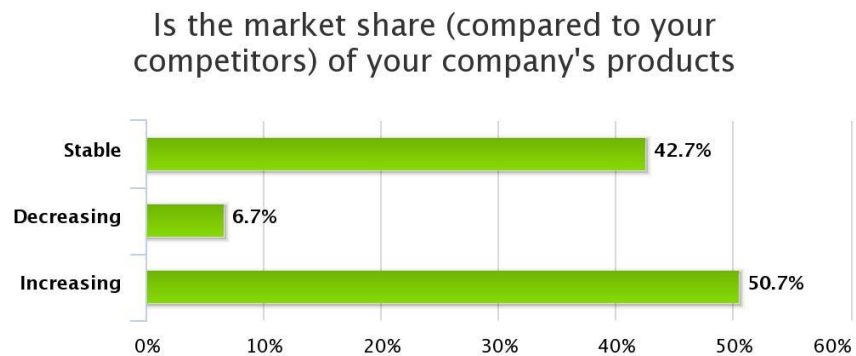
Figure 40: Status of market for product/service



Note: 769 respondents

51% (311 businesses) of respondents indicated that their share of the market for their product, in comparison with their competitors, is increasing, while 43% (262 businesses) indicated that it is stable. A small number of respondents (7% or 41 businesses) indicated that their market share is decreasing.

Figure 41: Market Share in Comparison to Competitors



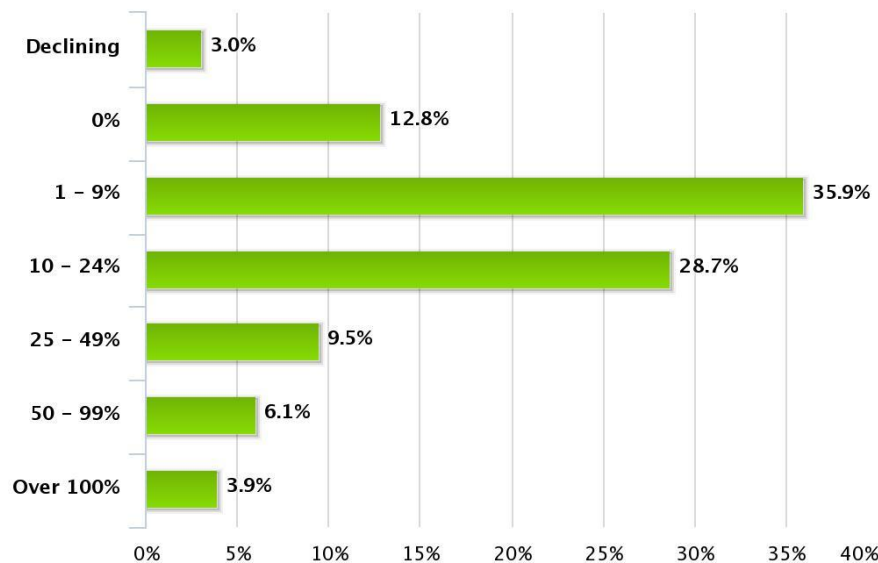
Note: 614 respondents

Growth

36% of respondents (249 businesses) expect to see low growth in sales in the realm of 1 – 9%. Moderate growth in sales of 10-24% over the next year is projected by 29% of respondents (199 businesses). 19% of respondents (135 businesses) expect growth exceeding 24% in the next year. 13% (89 businesses) of respondents expect their sales to remain stagnant, while a further 3% (21 business) expects sales to decline.

Figure 42: Projected sales growth in the next year

What is the projected sales growth in the next year at this business?

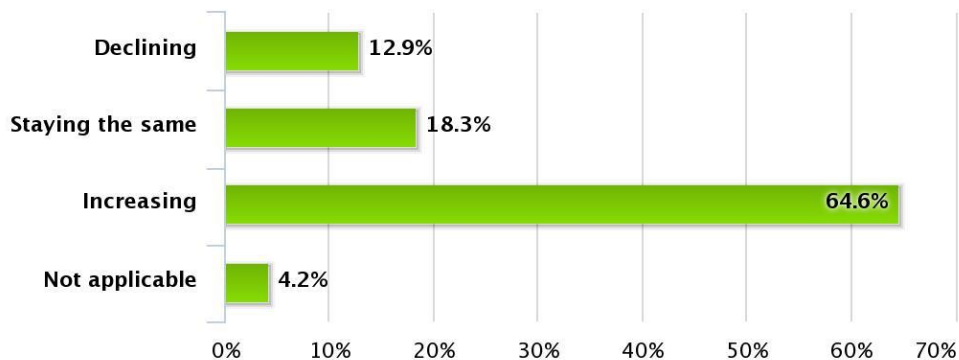


Note: 693 respondents

The majority of responses (65% or 462 businesses) indicated that sales at their business have increased over time, 18% (131 businesses) indicated that sales have remained relatively stable and 13% (92 businesses) reported that sales have declined.

Figure 43: Historic sales trend at this location

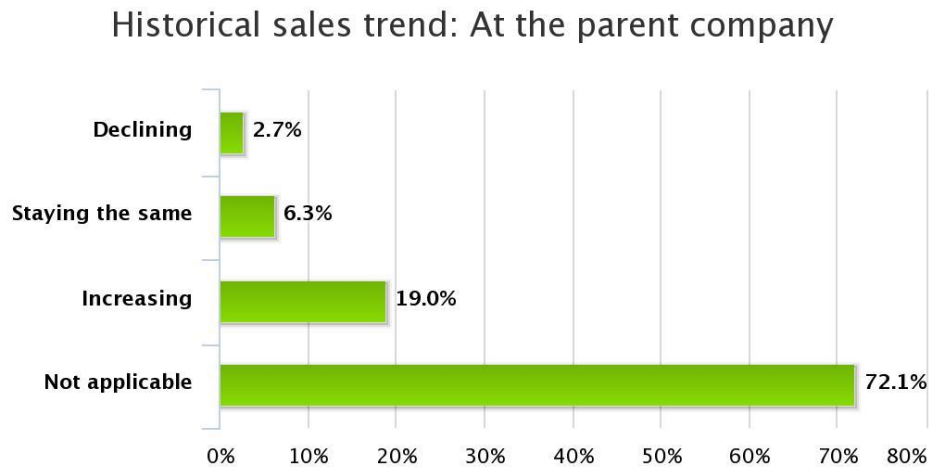
Historical sales trend: At this business (past five years)



Note: 715 respondents

Data indicates that the sales trend at parent companies is almost identical (68% increasing, 22% no change, 10% declining) after correcting for the high non-response rate (note that 72% of respondents indicate no parent company).

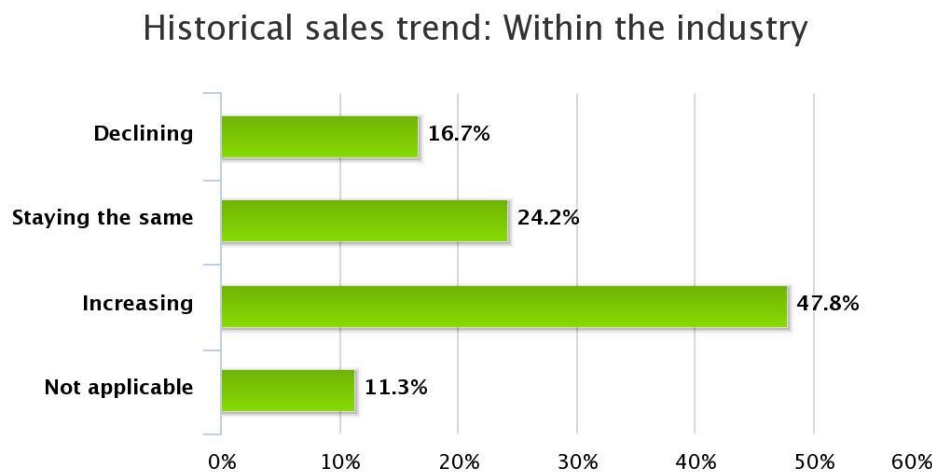
Figure 44: Historic sales trend at parent company



Note: 559 respondents

Data indicates that the sales trend within respondents' respective industries has followed similar trends, too. Again, after correcting for "not applicable" responses, the trends indicate 54% with increasing sales within industry, 27% stable, and 19% declining. The collection of figures 44 through 46 indicate that the blend of industries in the study area have been growing overall, while positions within respective industries is improving, but at a slower rate.

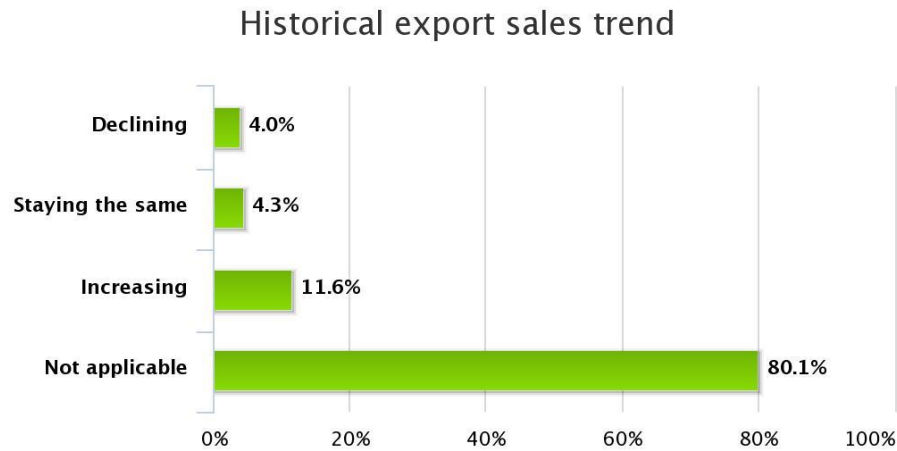
Figure 45: Historic sales trend within the industry



Note: 636 respondents

Again, after correcting for those businesses responding, “not applicable”, the sales trends in exporting businesses follow a very similar pattern with: 58% indicating increases, 22% reporting stability of sales, and 10% reporting a decline in exports.

Figure 46: Historical export sales trend

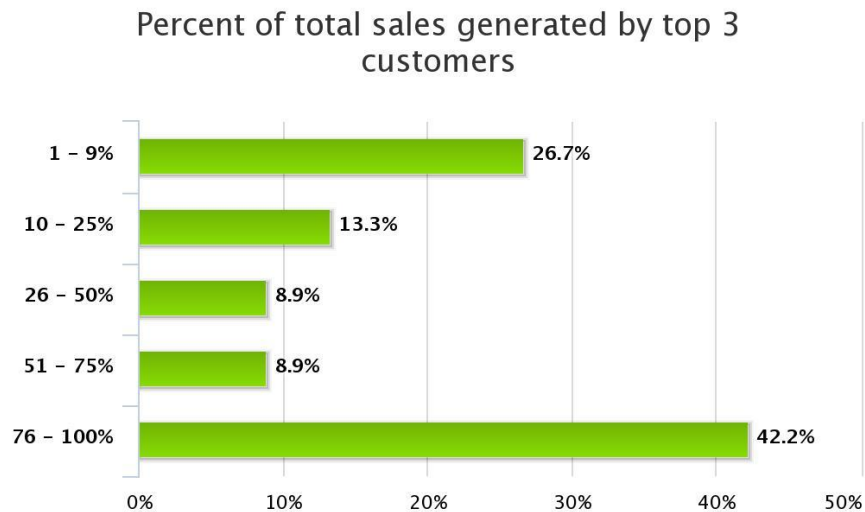


Note: 553 respondents

Source of Sales

The results of this particular question are subject to some under-sampling problems (not enough respondents for reliable results). The results reported below are only representative for a very limited geography.

Figure 47: Sales generated by top 3 customers

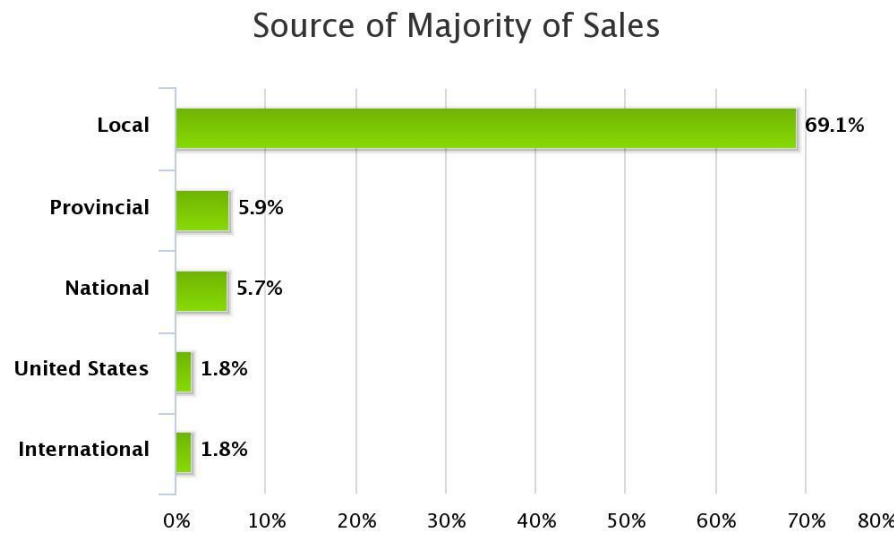


Note: 45 respondents

A majority of respondents (69% or 505 businesses) indicated that over 50% of their sales are to customers within the community or region. 6% (or 43) indicated that over 50% of their sales are

within the province. Fewer respondents (6%, 2%, 2%) indicated that the majority of their sales are to national, US or international markets, respectively.

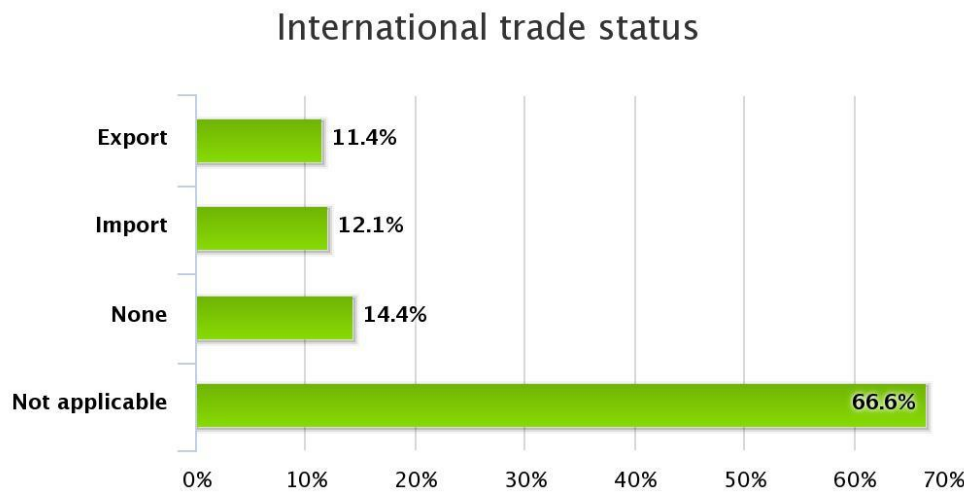
Figure 48: Geographic source of majority of sales



Note: 47 respondents

77 respondents (12%) indicated that they import goods or services from other countries and 73 respondents (11%) indicated that they export goods or services to other countries. 81% of respondents did not respond to the question or stated they did not engage in international trade.

Figure 49: International trade status

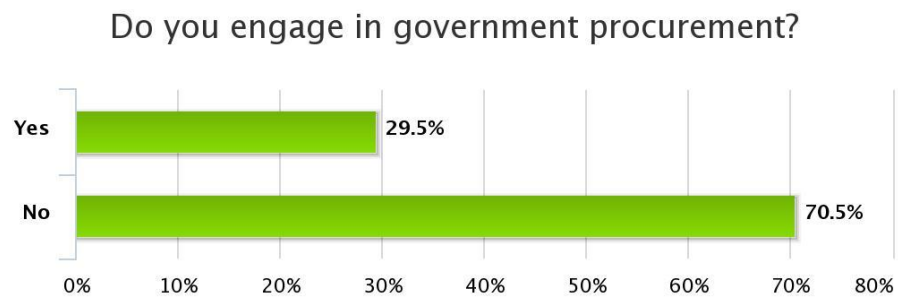


Note: 667 respondents

Procurement

Of the 237 responses, only 30% indicated that they do engage in government procurement.

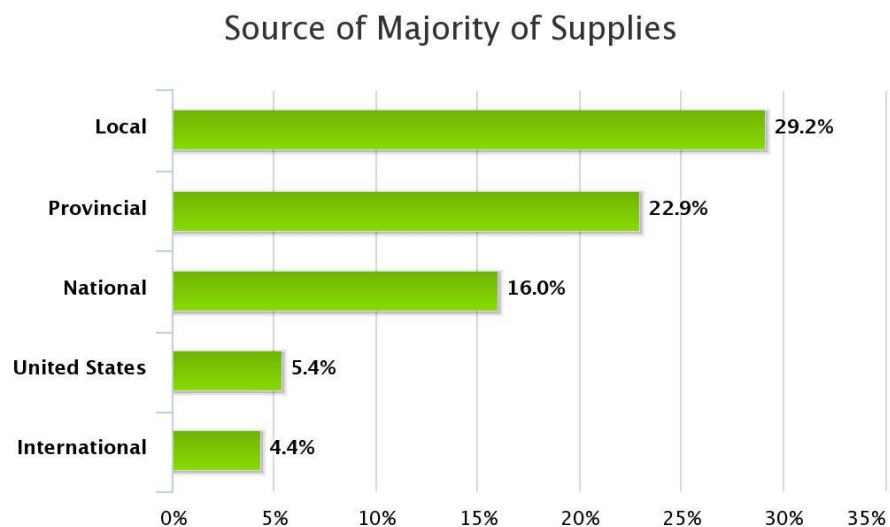
Figure 50: Engagement with government procurement processes



Note: 237 respondents

29% of respondents (206 businesses) interviewed reported that they purchase a majority of their supplies from local sources. 23% (162 businesses) indicated that the majority of their supplies come from businesses located within the province.

Figure 51: Geographic source of majority of supplies



Note: 550 respondents

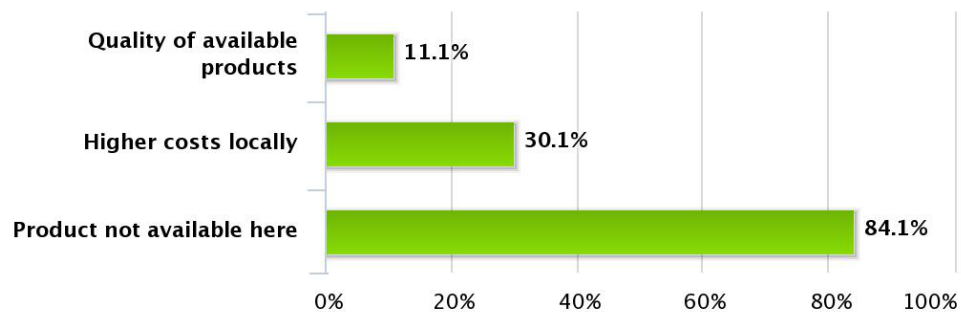
Purchasing

When reflecting on their reasons for purchasing products or services from out-of-area suppliers, the most common response (84% or 327 businesses) indicated that the products they need are not available locally. The next most cited reason is higher cost (30%) with quality of available

products being the third most significant (11%). Other reasons included: head office decision, unaware of local vendors, existing long-term supply contracts, and loyalty to current supplier.

Figure 52: Reason for out-of-area purchasing

If majority of products/services are being purchased from outside of the area, why are they NOT being purchased from within the area?



Note: 389 respondents

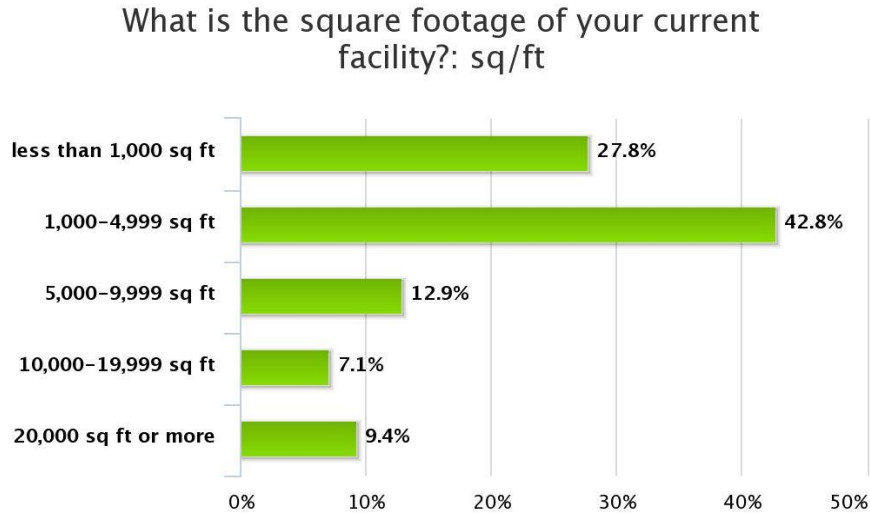
Products that businesses stated they would like to source from a local supplier include: computers and software, food goods (meat, dairy, fruits and veg), office supplies, construction materials, bedding and linens, auto parts and gardening supplies.

FACILITIES AND EQUIPMENT

Size and Condition

43% (265 businesses) of respondents reported that their facility is between 1,000 and 4,999 square feet in size, and another 28% (172 businesses) indicated it was less than 1,000 square feet. The remaining 29% of respondents are located in larger facilities (13%: 5000' – 10000', 7%: 10000' – 20000', 9%: over 20000')

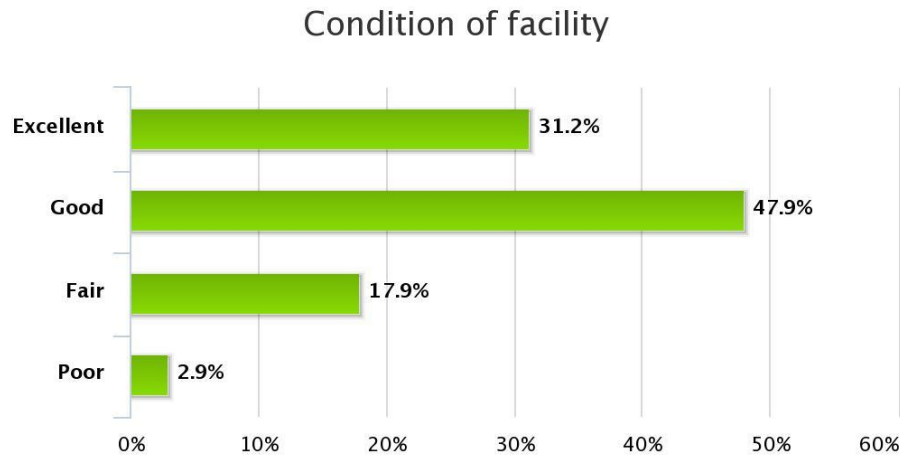
Figure 53: Size of facility



Note: 619 respondents

48% of respondents (327 businesses) indicated that their facility is in good condition. Another 31% (213 businesses) indicated that it is in excellent condition and 18% (122 businesses) reported that their facility is in fair condition. Only 3% (20 businesses) reported that their facility was in poor condition.

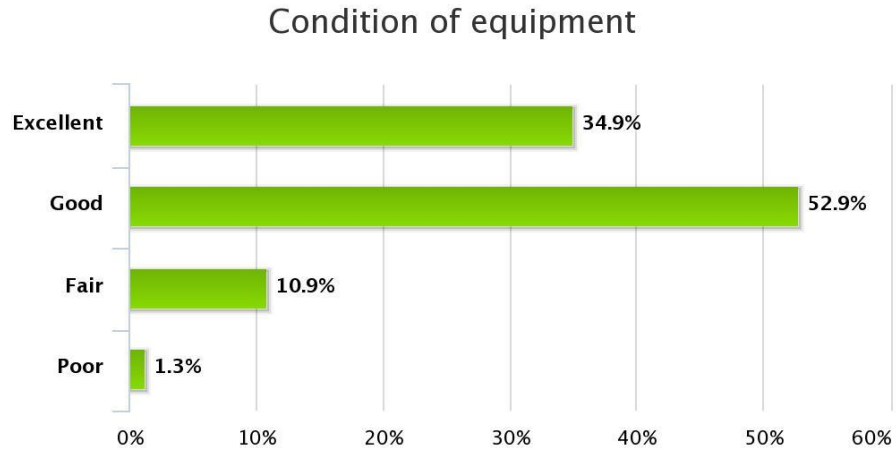
Figure 54: Condition of facility



Note: 682 respondents

35% (238 businesses) of respondents indicated that their equipment is in excellent condition. 53% (360 businesses) indicated that it is in good condition and 11% (74 businesses) report their equipment is in fair condition.

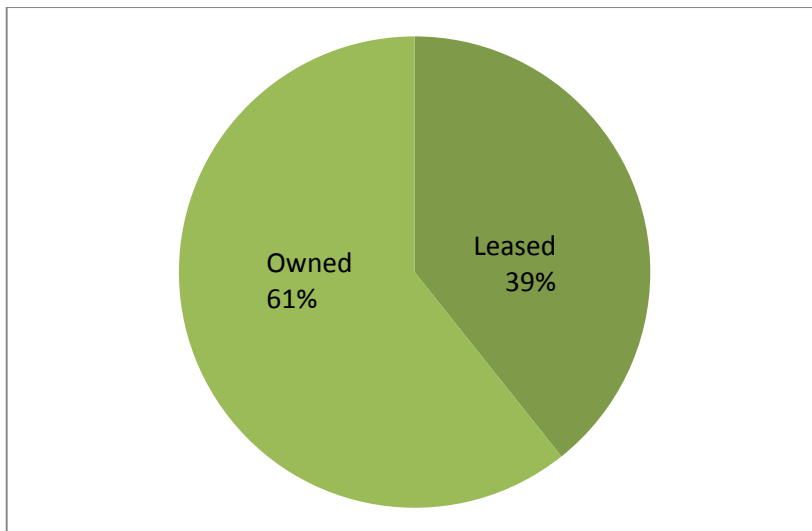
Figure 55: Condition of equipment



Note: 681 respondents

Ownership

Figure 56: Ownership status of facility



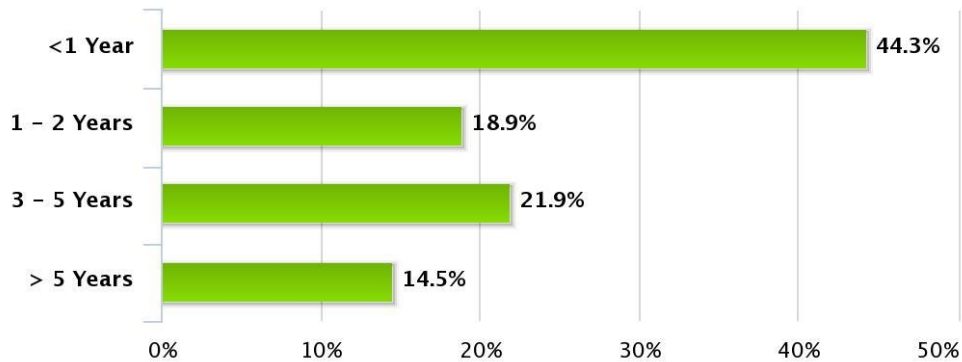
61% of respondents (448 businesses) own the facility in which they operate and 39% (290 businesses) lease it.

Note: 738 respondents

Of the 290 businesses that lease their facility, 44% have less than a year remaining on their lease, 19% have between one and two years, and 22% have between 3 and 5 years remaining. The majority of respondents that lease their facility (83% or 251 businesses) intend to renew their current lease agreement.

Figure 57: Length of time remaining on lease

Status of facility: If *Leased*, what is the length of term remaining



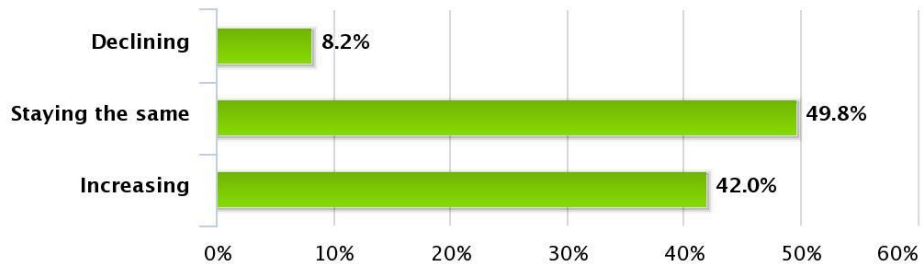
Note: 290 respondents

Investment and Expansion

42% of respondents (252 businesses) indicated that their company's investment in their facility has increased over the past 18 months, while just 8% or 49 businesses, indicated that the investment has declined. Almost 50% of businesses (299) indicated that investment in their facility has remained constant.

Figure 58: Historical Investment in facility (past 18 months)

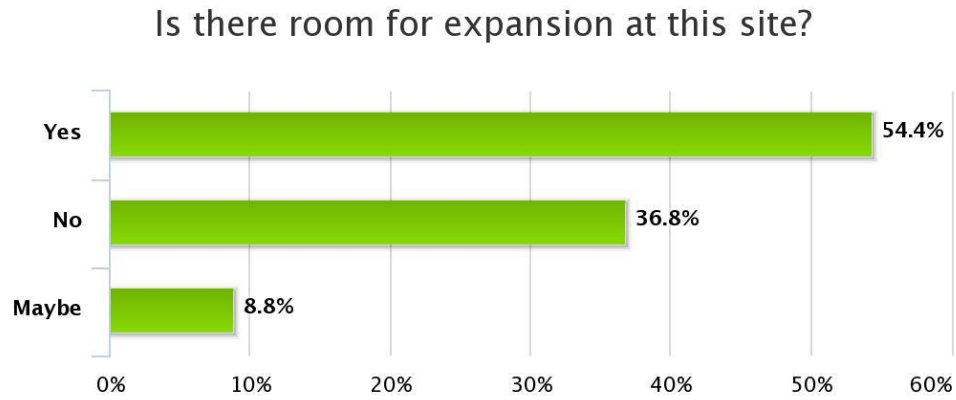
Historical investment trends: Over past 18 months in the *facility*



Note: 600 respondents

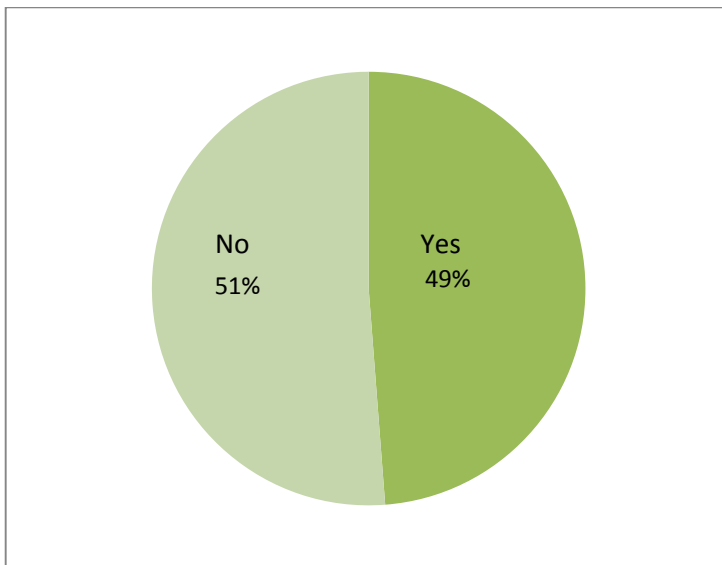
54% of respondents (358 businesses) indicated that there *was* room for expansion at their site, 37% (242 businesses) said that there *was not* room at their site. The remainder were unsure.

Figure 59: Room for expansion



Note: 658 respondents

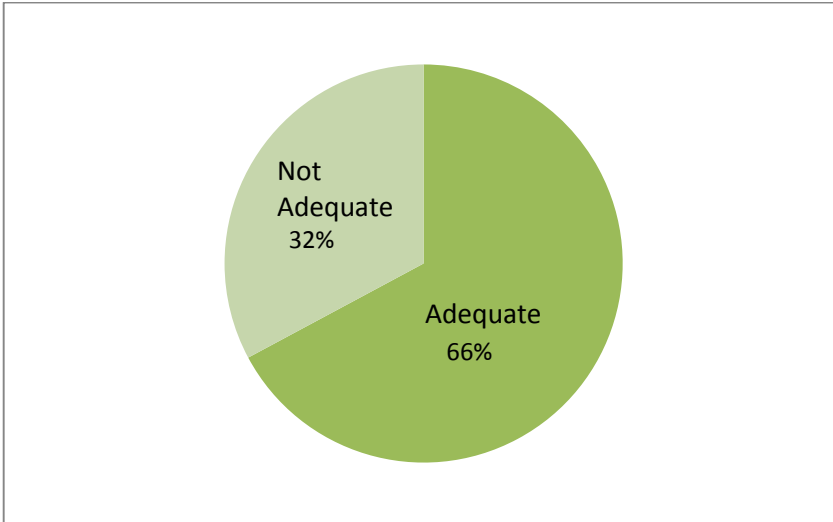
Figure 60: Plans to expand within three years



49% of respondents (361 businesses) plan to expand within three years, 51% (379 businesses) do not.

Note: 740 respondents

Figure 61: Adequacy of current site to support expansion

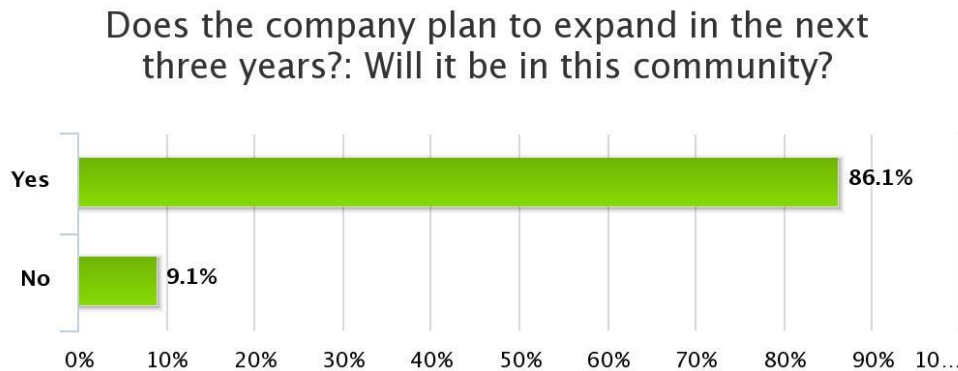


Of the businesses planning expansion, 66% (227 businesses) reported that their current site will be adequate. Notably however, 111 businesses (32%) reported that they will have to look for a new site to meet their planned expansion needs.

Note: 338 respondents

Most respondents (86% or 304 businesses) indicated that expansion will occur within the community.

Figure 62: Expansion to occur in community

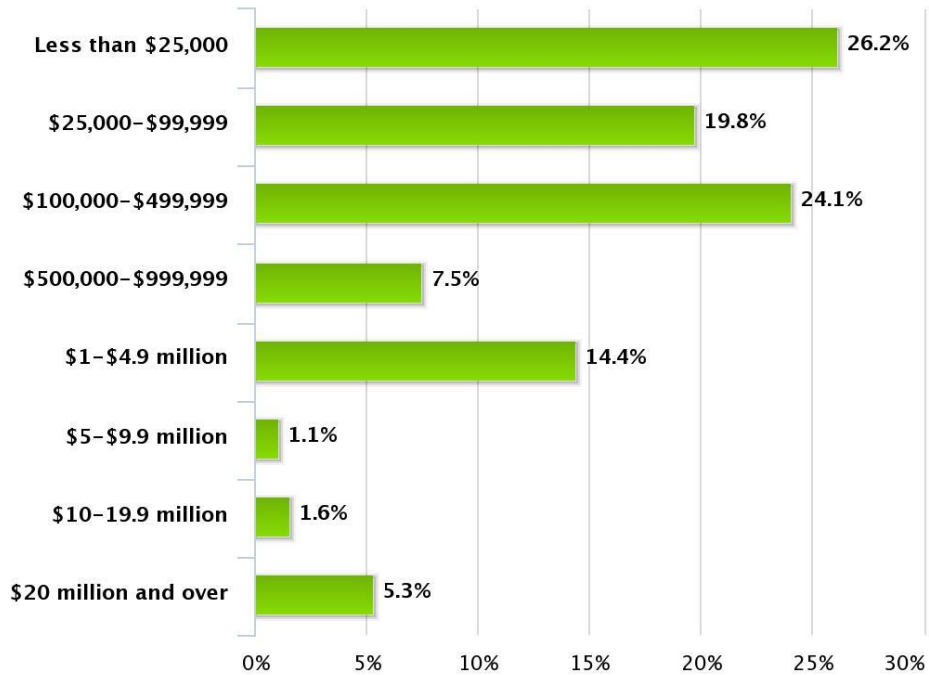


Note: 336 respondents

As detailed in figure 63, below, 187 of the 361 businesses planning expansion identified the approximate amounts they plan to spend on expansion related investments. A rough estimate of the total planned investment amounts to almost \$420M for the region.

Figure 63: Estimated expansion investment

Does the company plan to expand in the next three years?: Estimated total investment

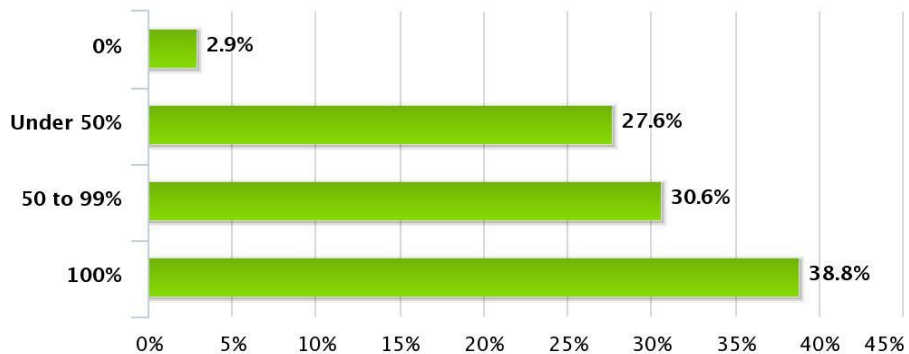


Note: 187 respondents

As detailed in figure 64, below, of the 361 businesses planning expansion, 170 responded to questions about their planned spending on equipment and technology. Of these, 66 (39%) responded that they expect to spend 100% of their expansion budget on equipment and technology. 31% (52 businesses) plan to spend over half, 28% (47 businesses) will spend less than half and 3% (5 businesses) will spend nothing.

Figure 64: Component of expansion budget for equipment and technology

Does the company plan to expand in the next three years?: Approximate percentage equipment/technology

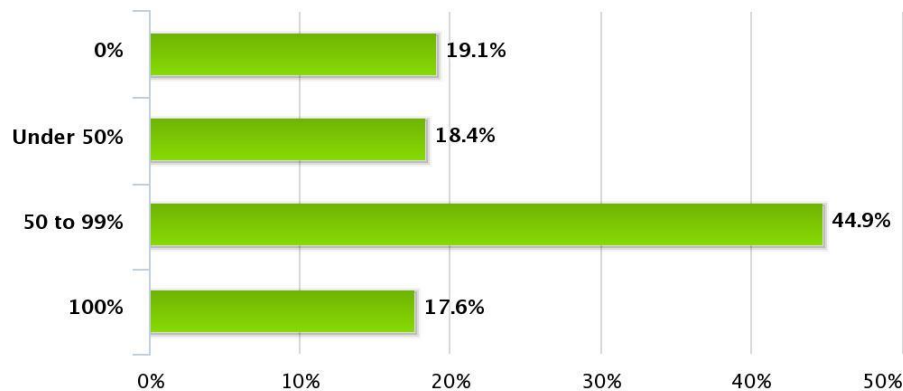


Note: 170 respondents

As detailed in figure 65, below, of the 361 businesses planning expansion, 136 responded to questions about their planned spending on real estate. Of these, 24 (18%) responded that they expect to spend 100% of their expansion budget on real estate. 45% (61 businesses) plan to spend over half, 18% (25 businesses) will spend less than half and 19% (26 businesses) will spend nothing.

Figure 65: Component of expansion budget for real estate

Does the company plan to expand in the next three years?: Approximate percentage real estate

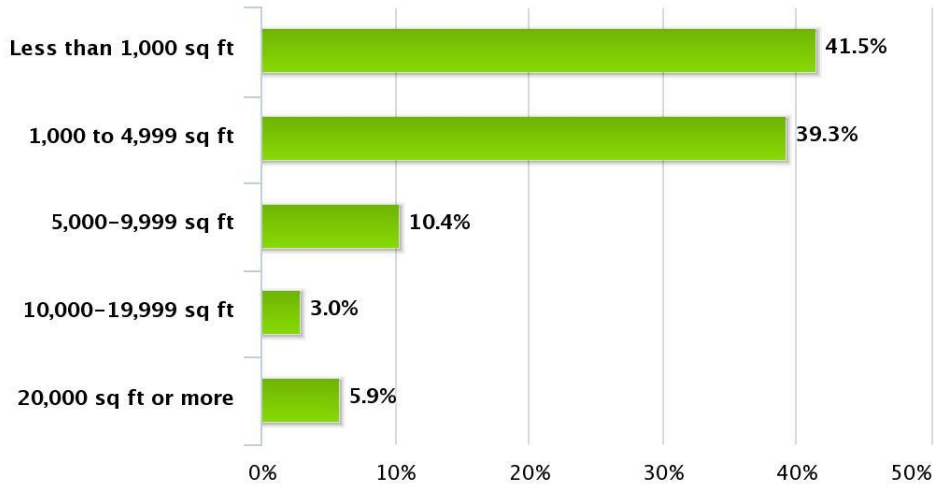


Note: 136 respondents

Of the businesses planning expansion 135 gave details on their planned facility expansion. Eight respondents (6%) indicated that they expect the size of their facility expansion will be 20,000 square feet or greater. Four businesses reported (3%) their expansion would be between 10,000 and 19,999 square feet, 14 businesses (10%) reported between 5000 and 9999 square feet, 53 businesses (39%) reported between 1000 and 4999 square feet and 56 businesses (41%) under 1000 square feet.

Figure 66: Size of facility expansion

Does the company plan to expand in the next three years?: Estimated facility size increase (sq/ft)



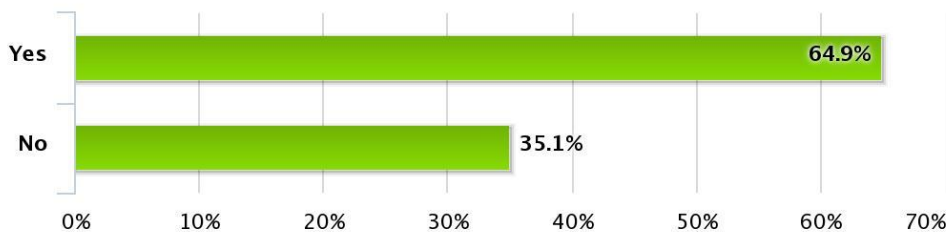
Note: 135 respondents

Facility Upgrades

65% of businesses (100 businesses) indicated that there had been recent facility upgrades. Of those 100 businesses, 58% indicated that those upgrades were completed in the last 12 months.

Figure 67: Recent facility upgrades

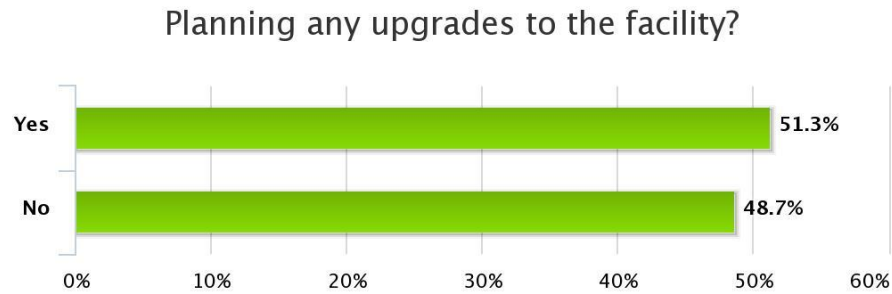
Have there been any recent facility upgrades?



Note: 154 respondents

51% (77 businesses) indicated that they are planning facility upgrades, and that the majority (83% or 59 businesses) of those planning upgrades will occur in the next 12 months. Respondents were also asked to identify any barriers to upgrading. There were no discernible trends to the barriers.

Figure 68: Planning facility upgrades

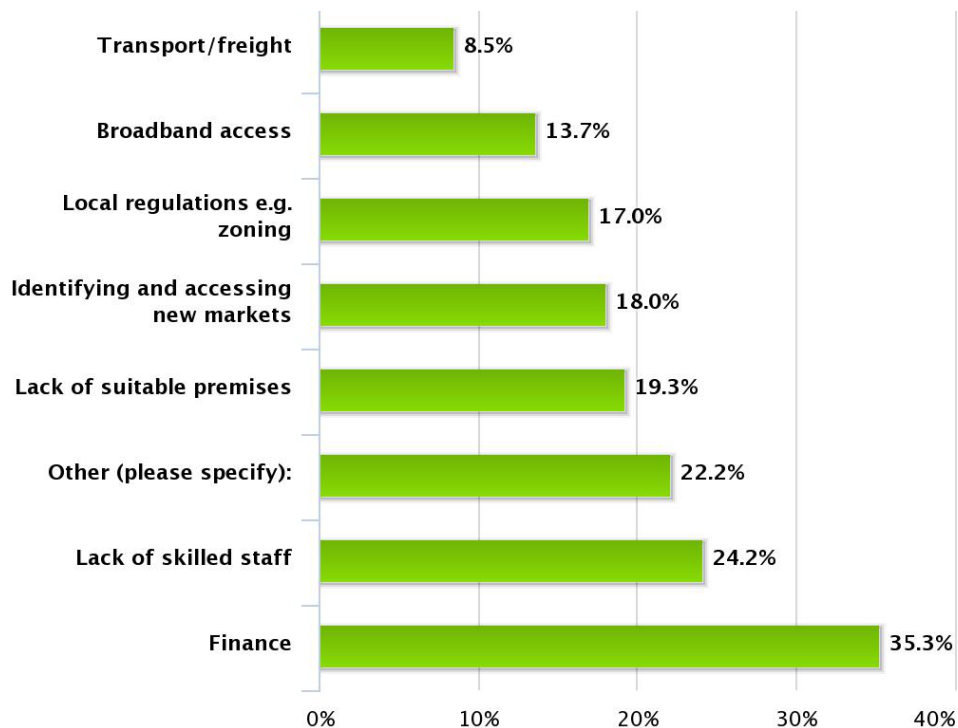


Note: 150 respondents

Respondents cited a variety of factors that act as barriers to expansion. Most common of those was finance (35% or 137 businesses), and a lack of skilled staff (24% or 94 businesses). Suitable premises, market access, local regulation, access to broadband internet and transportation were also significant.

Figure 69: Barriers to expansion

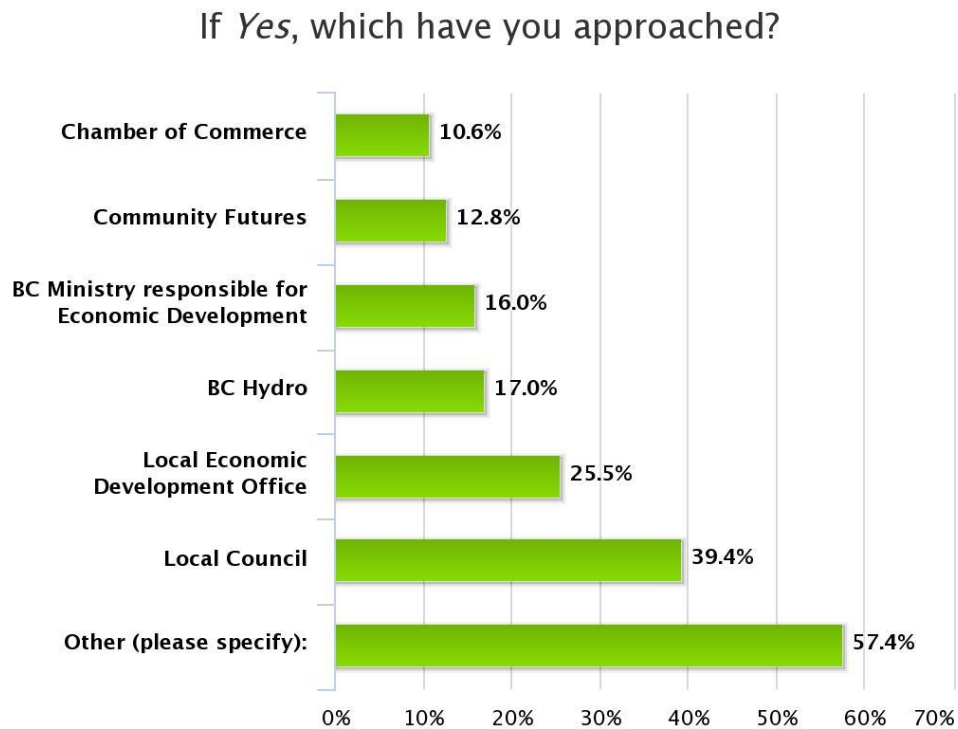
What, if any, are the major constraints on your expansion? (Please check all that are applicable)



Note: 737 respondents

28% of respondents (104 businesses) indicated that they have sought assistance with their expansion efforts from an external organization. Of those businesses, most (39% or 37 businesses) had approached their local government offices, 25% (24 businesses) had approached their local Economic Development office, 17% (16 businesses) approached BC Hydro, 16% (15 businesses) approached the provincial ED ministry, 13% (12 businesses) approached Community Futures, and 11% (10 businesses) approached the local Chamber of Commerce. The 'Other' responses show no strong trending responses (see appendix for details).

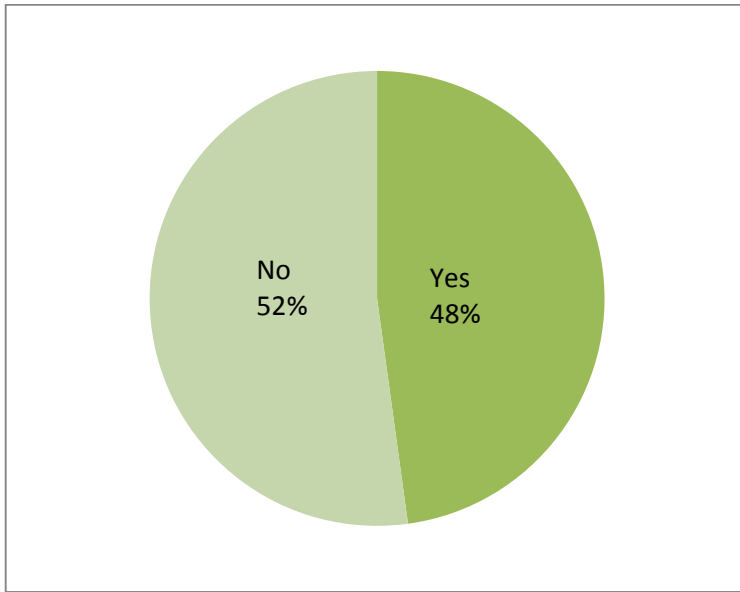
Figure 70: Organizations approached for expansion assistance



Note: 168 respondents

Energy Efficiency

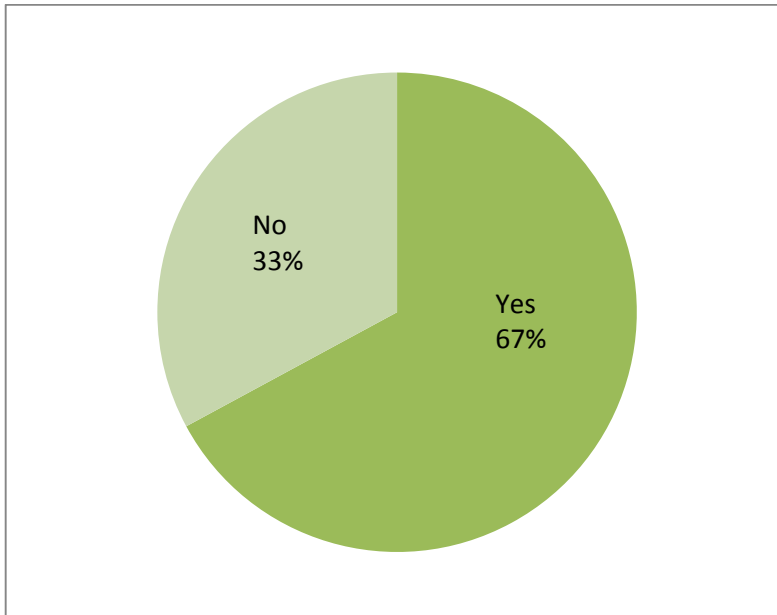
Figure 71: Considering energy efficiency in expansion plans



48% of those who responded (13 businesses) are considering energy efficiency in their expansion plans.

Note: 161 respondents

Figure 72: Awareness of BC Hydro Power Smart



67% of respondents (459 businesses) are familiar with the energy efficiency support available through the BC Hydro Power Smart program.

Note: 684 respondents

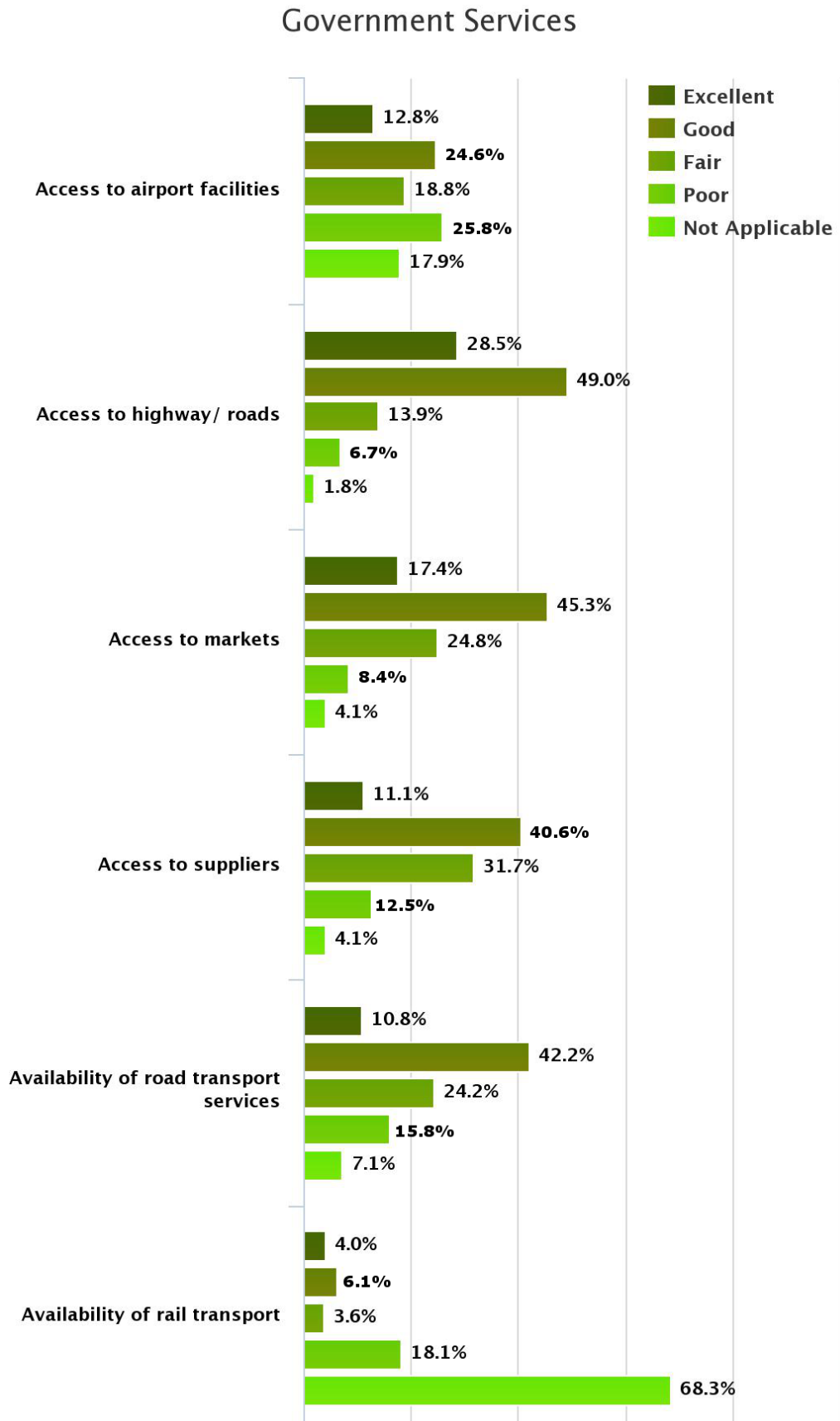
GOVERNMENT SERVICES¹²

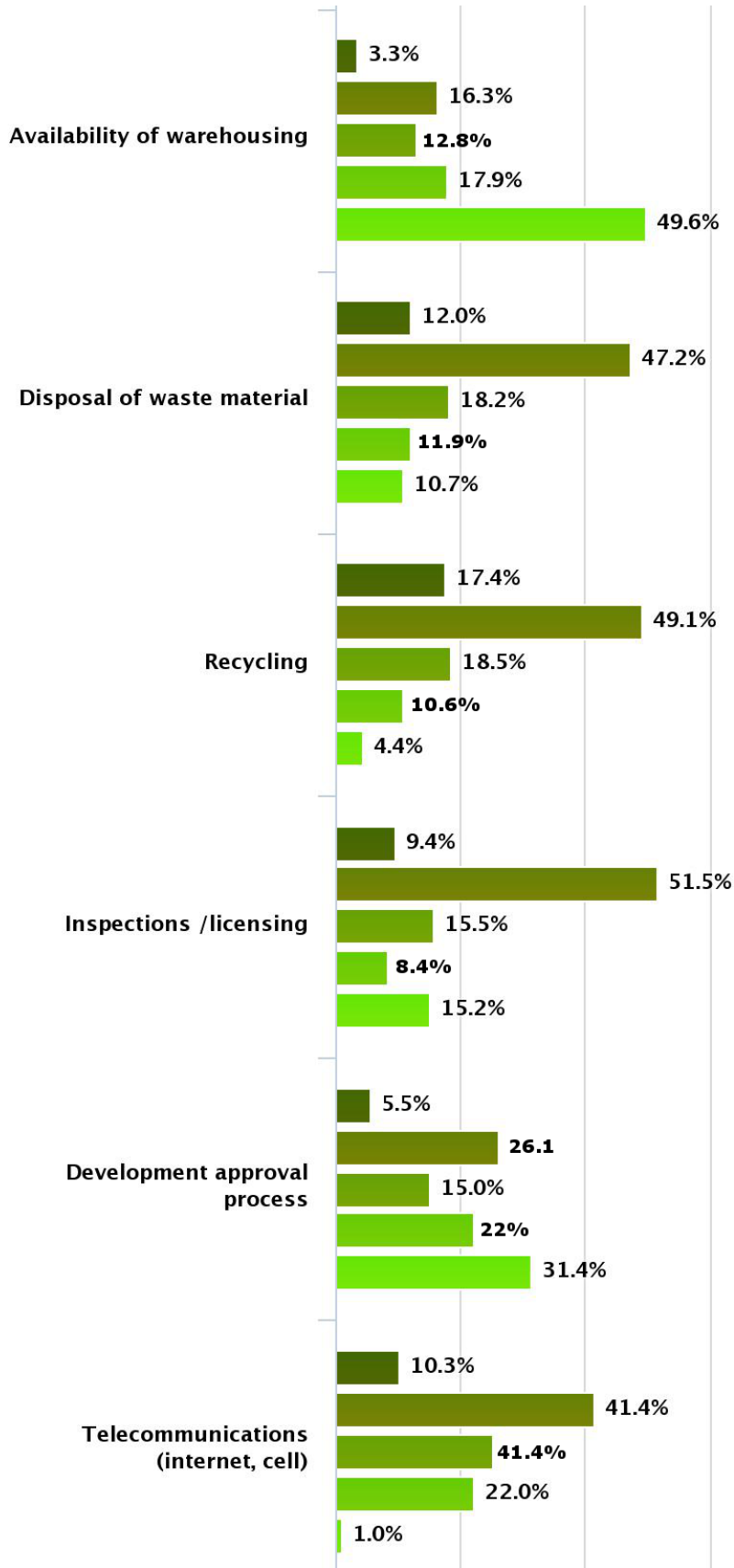
Respondents were asked to rate a list of government services as poor, fair, good or excellent. Respondents also had the option to rate a service as not applicable to their business.

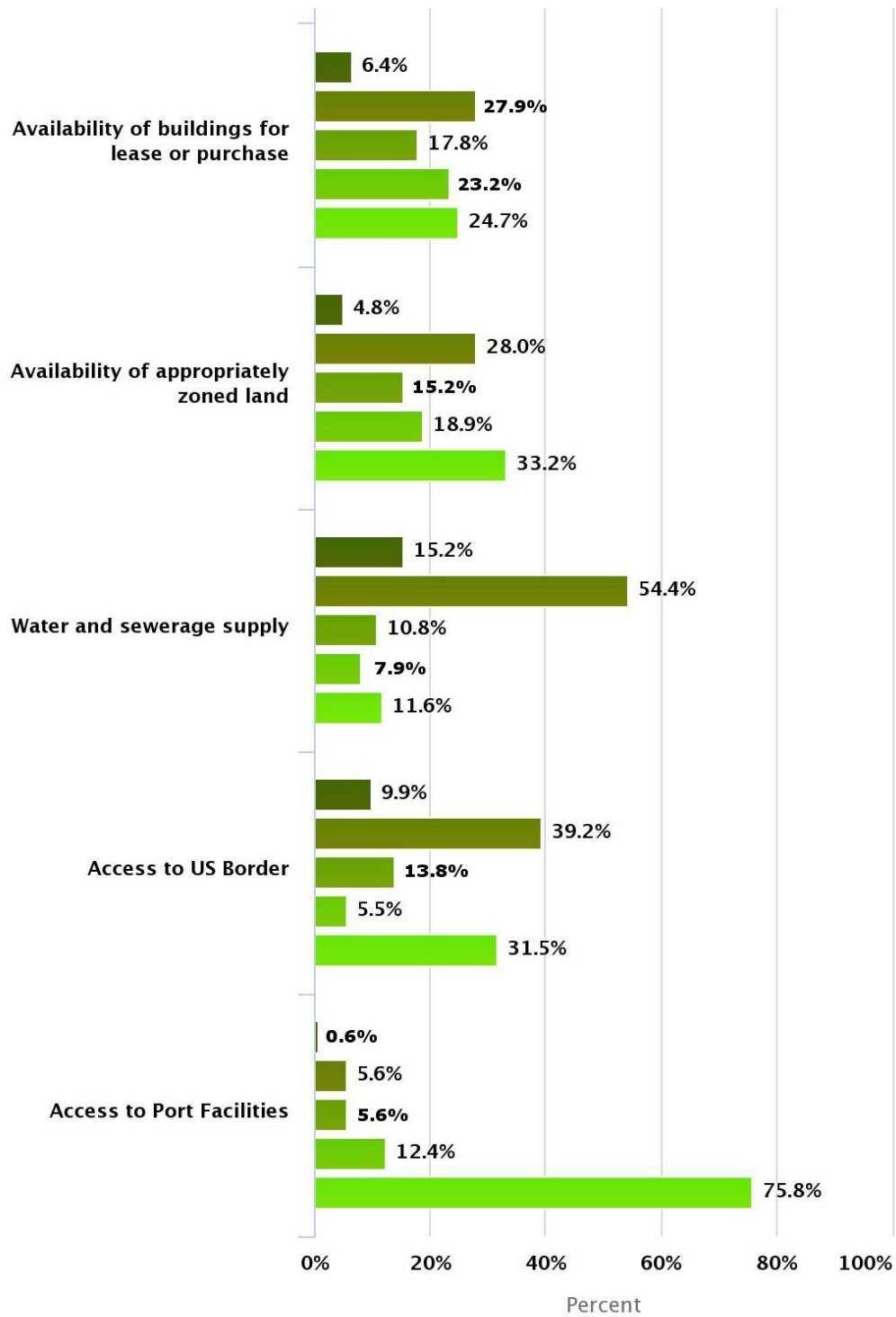
- The services that received the highest number of **POOR** ratings were:
 - Access to airports (27% or 215 businesses),
 - Telecommunications (19% or 148 businesses), and
 - Availability of buildings for lease or purchase (17% or 133 businesses).
- The services that received the highest number of **FAIR** ratings were:
 - Access to Suppliers (31% or 20 businesses),
 - Telecommunications (21% or 170 businesses), and
 - Access to markets (21% or 165 businesses).
- The services that received the highest number of **GOOD** ratings were:
 - Access to highways/roads (44% or 349 businesses),
 - Water and sewerage (42% or 332 businesses), and
 - Recycling (41% or 324 businesses).
- The services that received the highest number of **EXCELLENT** ratings were:
 - Access to highways/roads (26% or 203 businesses),
 - Access to markets (15% or 116 businesses), and
 - Recycling (14% or 115 businesses).
- The services that the highest number of respondents felt are **NOT APPLICABLE** to their business were:
 - Availability of rail transport (41% or 325 businesses),
 - Availability of warehousing (32% or 252 businesses), and
 - Availability of appropriately zoned land (23% or 181 businesses).

¹² This is a loose definition of services provided by all levels of governments and, occasionally, by private industry. But, these generally fall into the infrastructure category.

Figure 73: Rating of government services







Note: 161-712 respondents

When asked whether there were any suggestions on how to improve any of the services and infrastructure, 67% respondents (472 businesses) indicated they had suggestions. The highest number of responses (29% or 137 businesses) discussed improvements to telecommunications and expanded broadband and cell service. Improvements to the airport services were also

referenced by 12% (58 businesses) of respondents. Improvements to highway and roadway quality and servicing was referenced by 12% of respondents (56 businesses).

Figure 74: Suggested improvements to government services: Key words



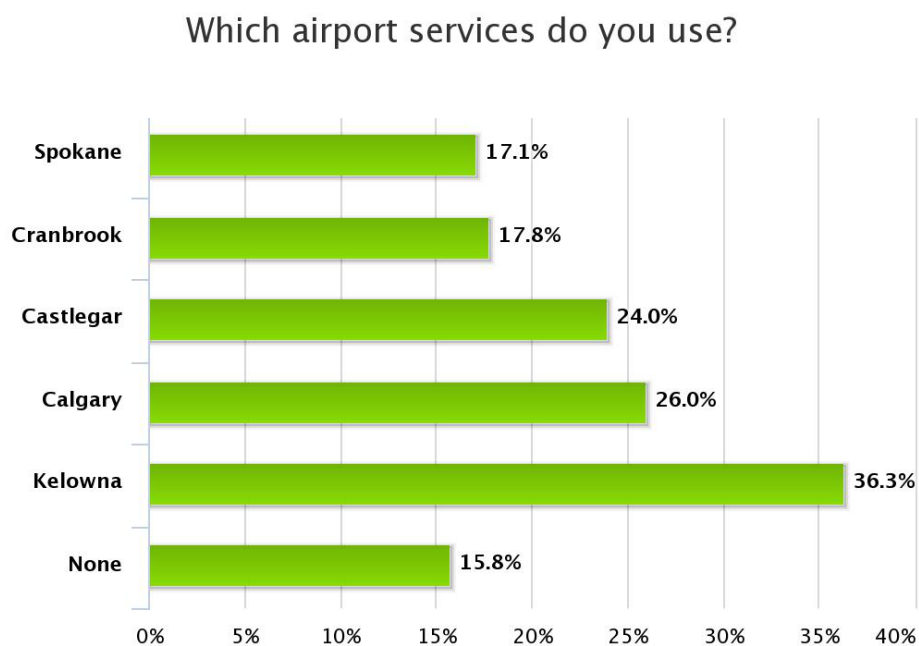
“Need a community liaison officer to communicate with local businesses”

“There should be more promotion of commercial buildings that are available.”

Airport Service

As detailed in figure 75, below, the Kelowna International Airport is the most used airport, with 36% of respondents (53 businesses) indicating they use that airport. The Calgary International Airport was second most used with 26% (38 businesses), and the Castlegar Airport being used by 24% of respondents (35 businesses).

Figure 75: Airport service used

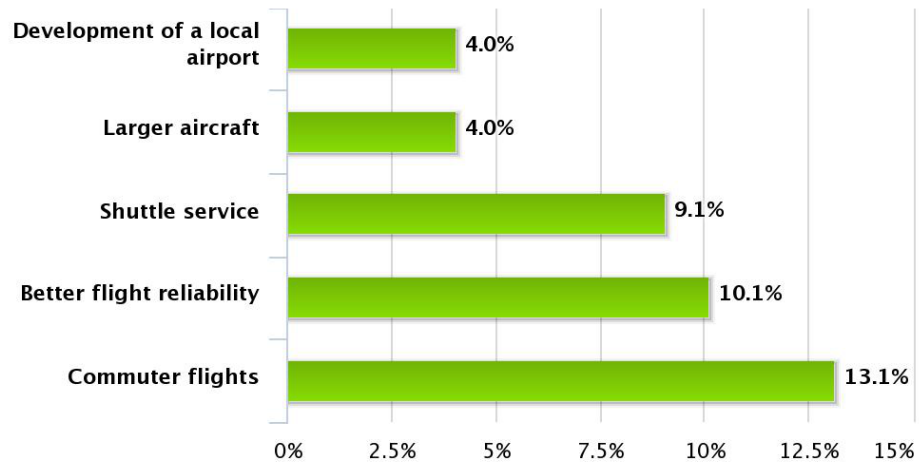


Note: 235 respondents

Respondents indicated that they would most like to see commuter flights (13% or 7 businesses), with 10% of respondents (10 business) indicating a desire for better flight reliability, 9% (9 businesses) asking for shuttle service and 4% (4 businesses) recommending larger planes.

Figure 76: New services at local airport (Canadian Rockies International Airport)

Which airport services do you use?: What services would you like to see at the local airport? (where appropriate)



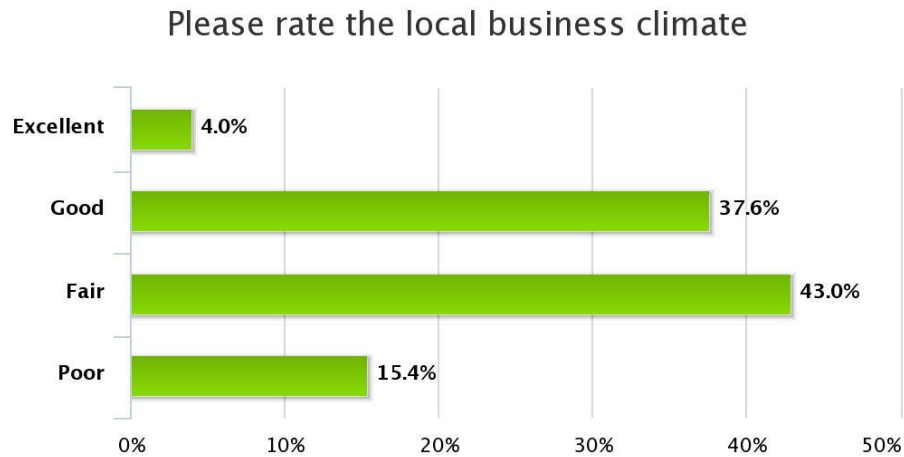
Note: 74 respondents

BUSINESS CLIMATE

Quality of Business Climate

The majority of responses rated the overall business climate as fair (43% or 323 businesses).

Figure 77: Rating of local business climate

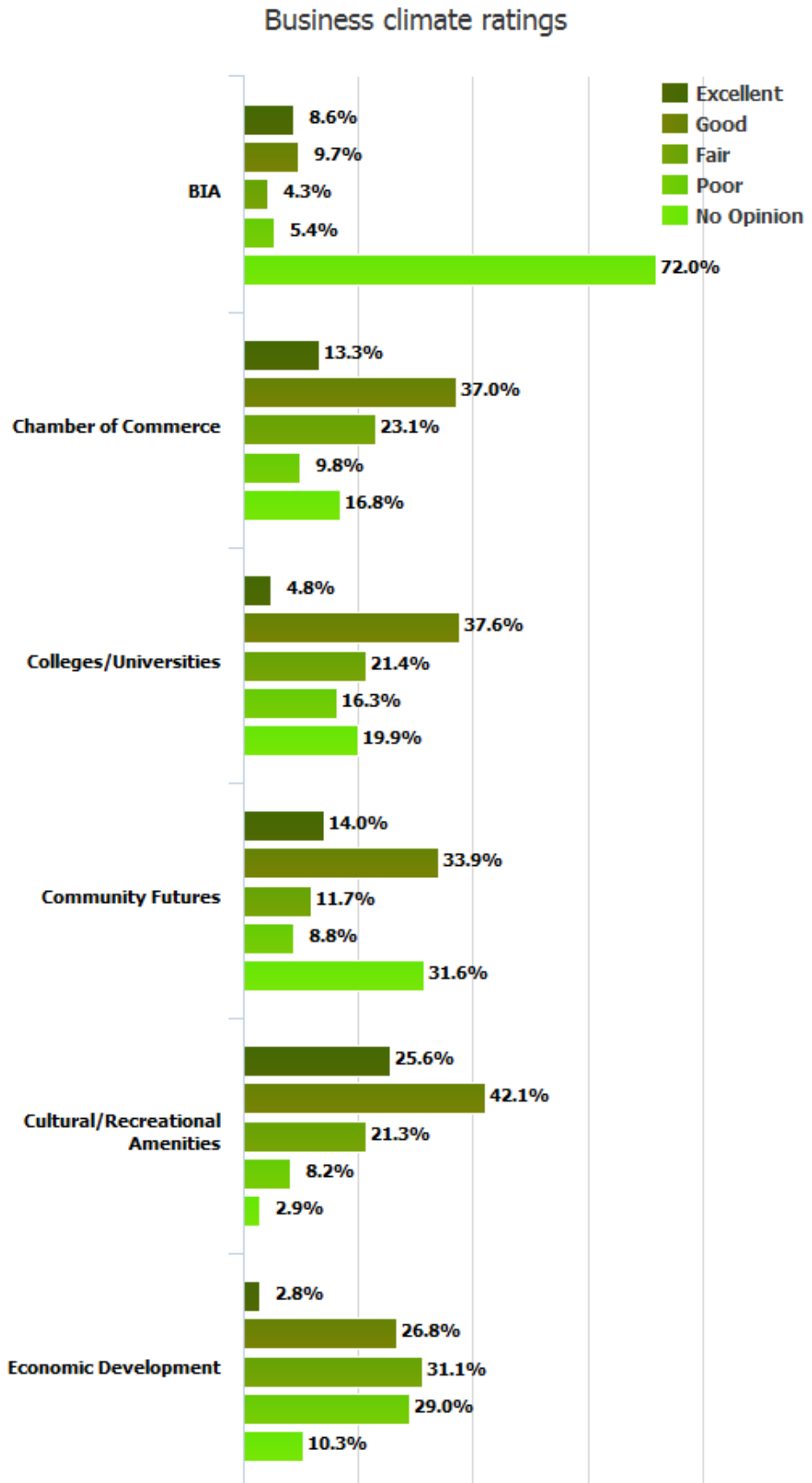


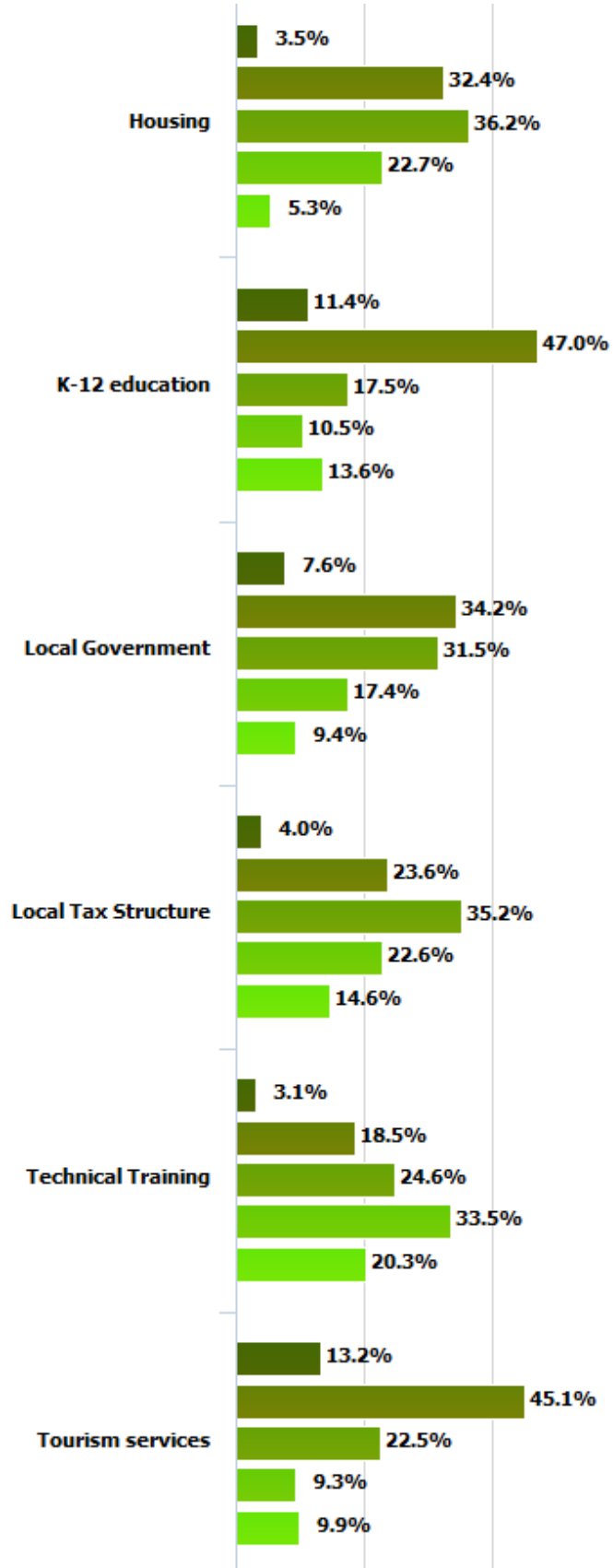
Note: 752 respondents

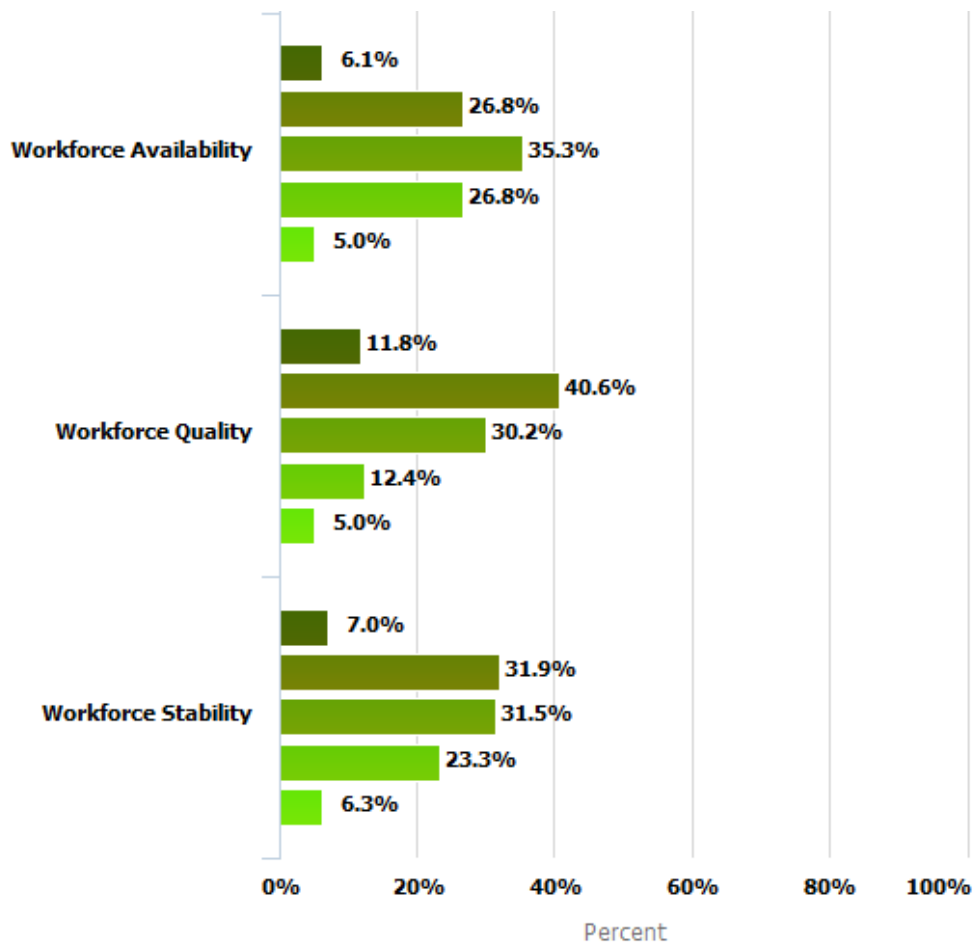
Respondents were asked to rate the quality of a list of specific business climate factors as either poor, fair, good, excellent or not applicable to their business.

- The factors that received the highest number of **POOR** ratings included:
 - Technical training (29% / 230 businesses),
 - Economic development (26% or 208 businesses), and
 - Workforce availability (24% / 192 businesses).
- The factors that received the highest number of **FAIR** ratings included:
 - Housing (33% / 260 businesses),
 - Workforce availability (32% or 253 businesses), and
 - Local tax structure (31% / 249 businesses).
- The factors that received the highest number of **GOOD** ratings included:
 - K-12 education (42% / 335 businesses),
 - Cultural and recreational opportunities (38% or 303 businesses), and
 - Colleges and universities (33% / 265 businesses).
- The factors that received the highest number of **EXCELLENT** ratings included:
 - Cultural and recreational opportunities (23% / 184 businesses),
 - Workforce quality (11% or 85 businesses), and
 - K-12 education (10% / 81 businesses).
- The factors that received the highest number of **NO OPINION** ratings include:
 - Colleges and universities (18% / 140 businesses),
 - Technical training (17% or 139 businesses), and
 - Local tax structure (13% / 103 businesses).

Figure 78: Rating of business climate factors



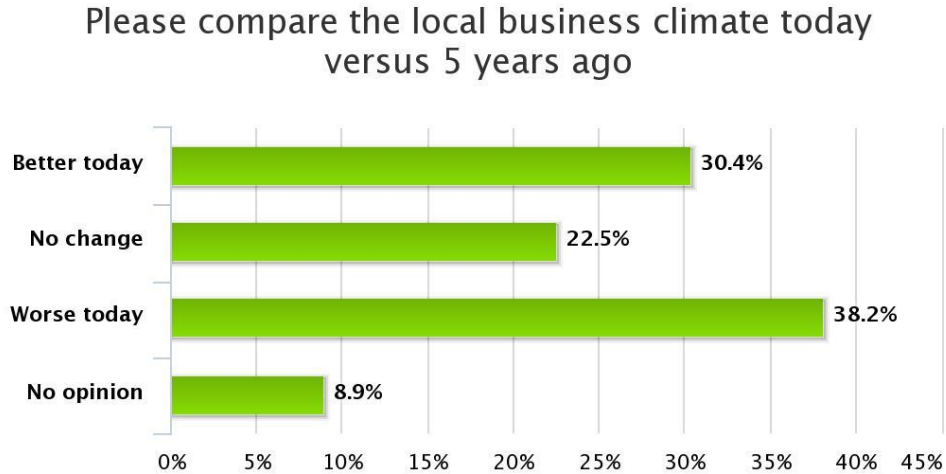




Note: 93-719 respondents

30% of respondents (221 businesses) felt that the business climate is better today than it was 5 years ago. 38% (278 businesses) thought that it is worse, and 23% (164 businesses) believed there was no change in the business climate.

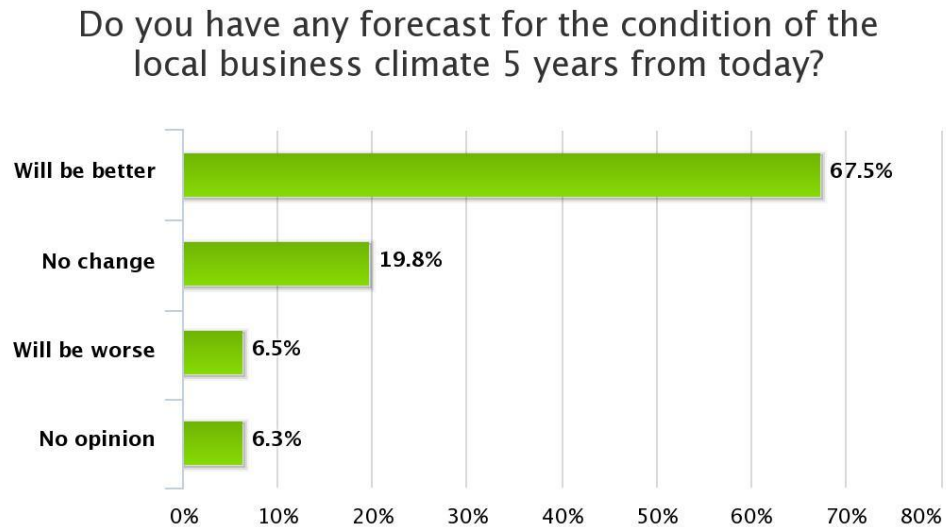
Figure 79: Business climate today vs. 5 years ago



Note: 728 respondents

67% of respondents (502 businesses) expect that the business climate will be better 5 years from today. 7% (48 businesses) expect that it will be worse.

Figure 80: Business climate 5 years from today



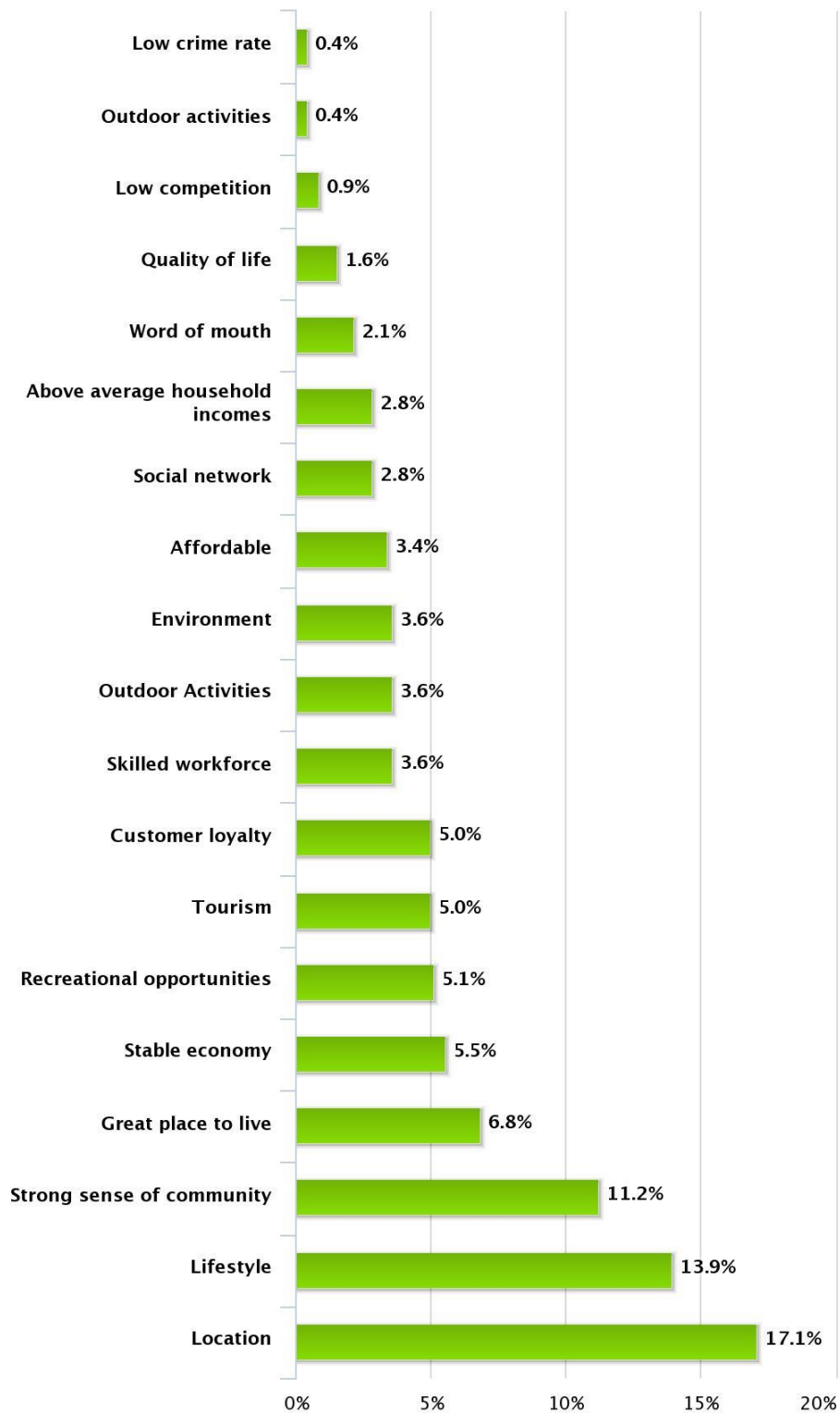
Note: 744 respondents

Strengths and Weaknesses of Business Climate

Asked to list the community's strengths as a place to do business, the highest number of responses (17% or 120 responses) cited location as the community's strength. 14% (98 businesses) indicated lifestyle, and 11% (79 businesses) indicated the strong sense of community was a factor in the community's strength as a place to do business.

Figure 81: Community's strengths as a place to do business

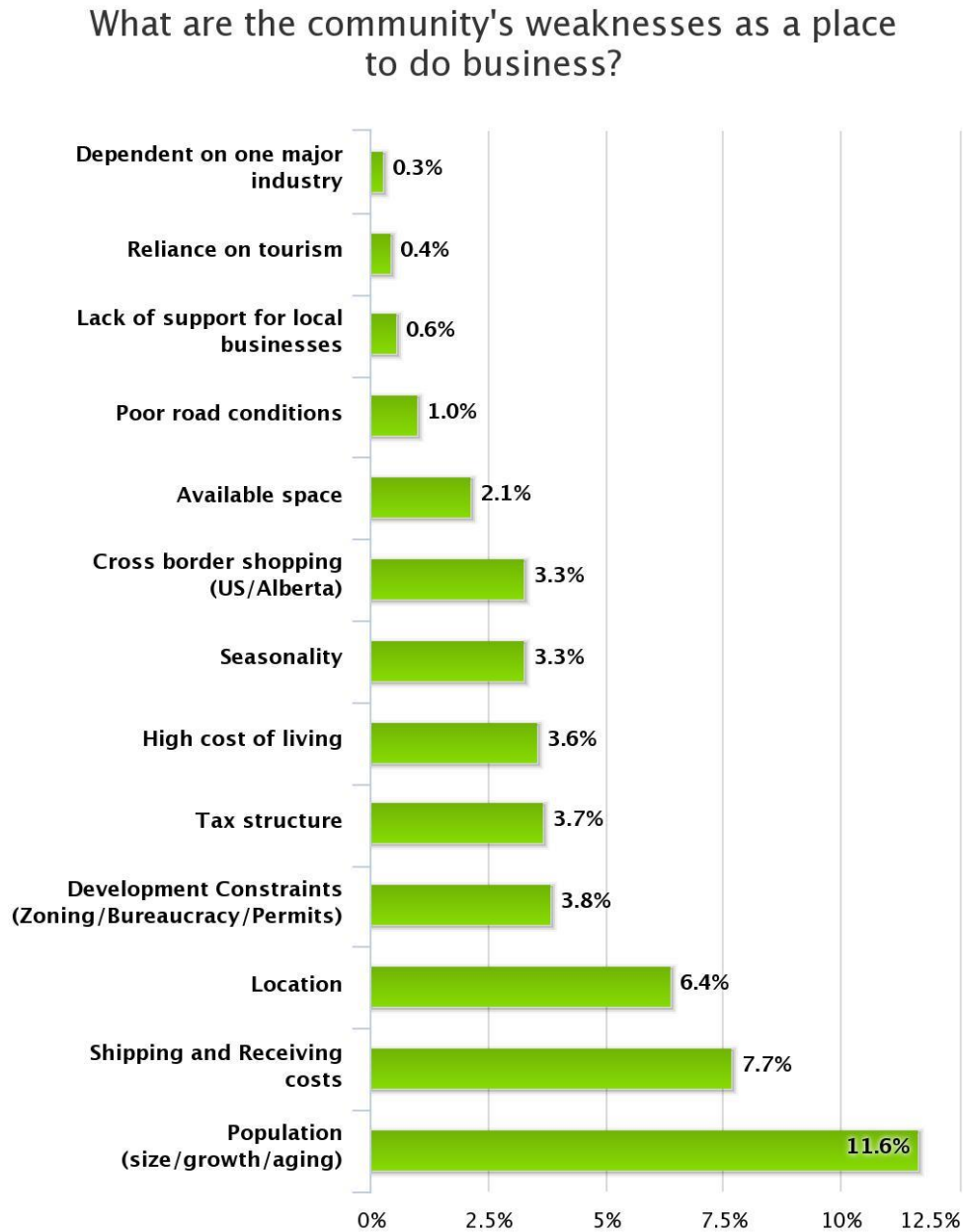
What are the community's strengths as a place to do business?



Note: 667 respondents

Asked to list the community's weaknesses as a place to do business, the highest number of responses (12% or 82 respondents) related to limited population. Shipping and receiving costs accounted for 8% of responses (54 businesses), while location was cited by 6% (45 businesses).

Figure 82: Community's weaknesses as a place to do business



Note: 336 respondents

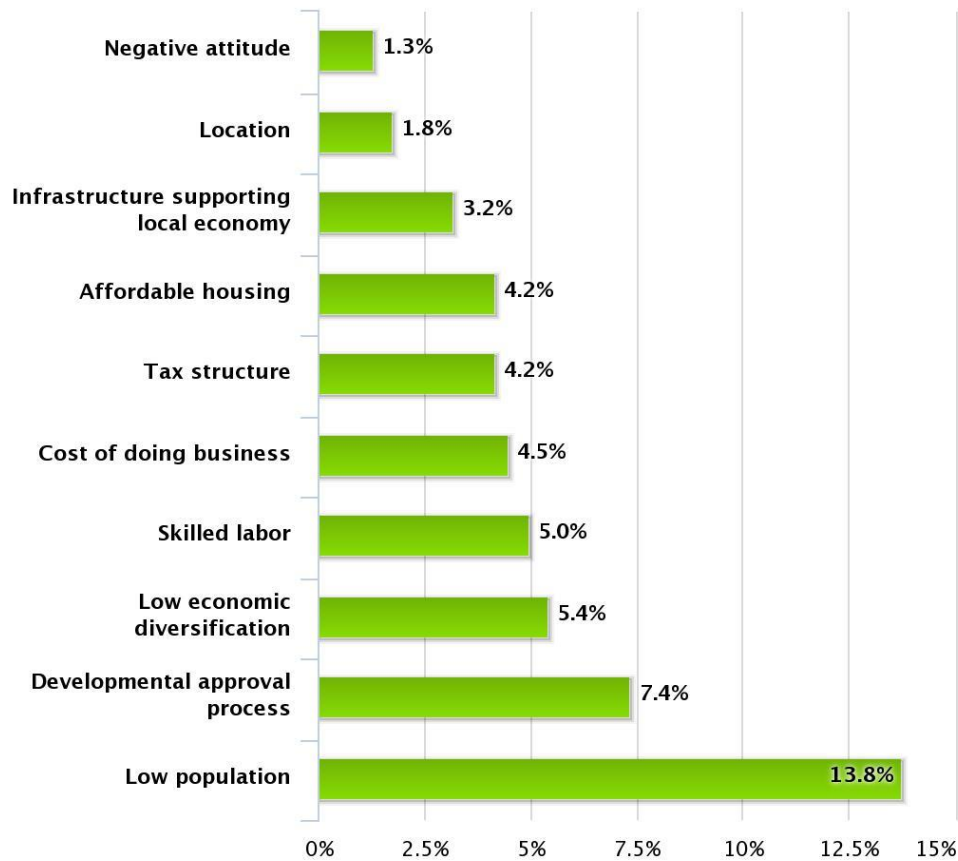
Business Growth

As detailed in figure 83, below, 85% of respondents (637 businesses) indicated that there are barriers to growth. The highest number of respondents (14% or 86 businesses) stated that the low population is the most important barrier to growing the community's economy. Other commonly

cited barriers include: the development process (7% or 46 businesses), low economic diversification (5% or 34 businesses) and skilled labour shortages (5% or 31 businesses).

Figure 83: Barriers to growth in the community

Are there any barriers to growth in this community? : If Yes, what are they?



Note: 316 respondents

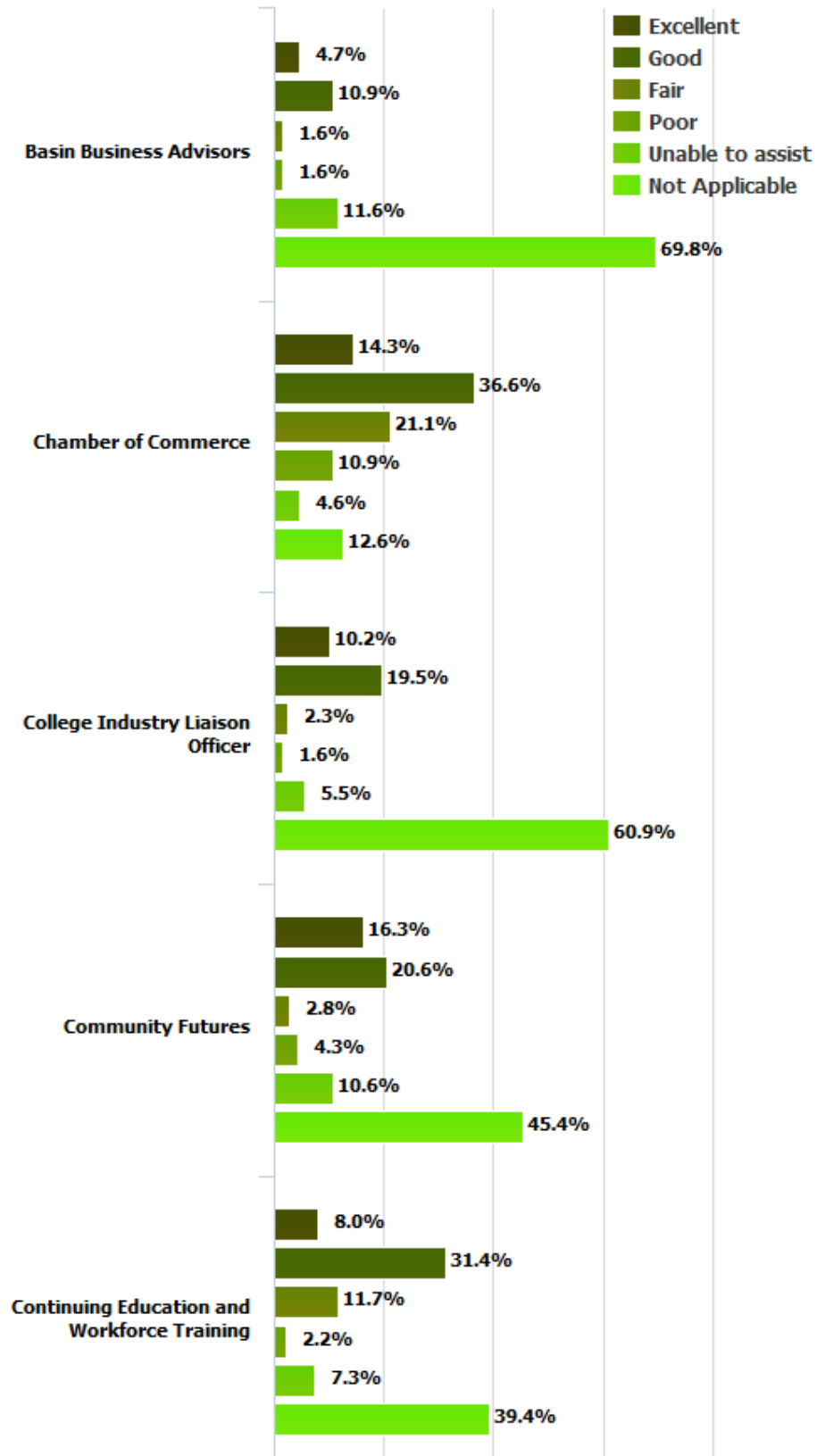
Respondents were asked about the level of support they received from various business support providers. The Chamber of Commerce received the highest responses in each category; clearly, this is a reflection on the level of support they offer¹³.

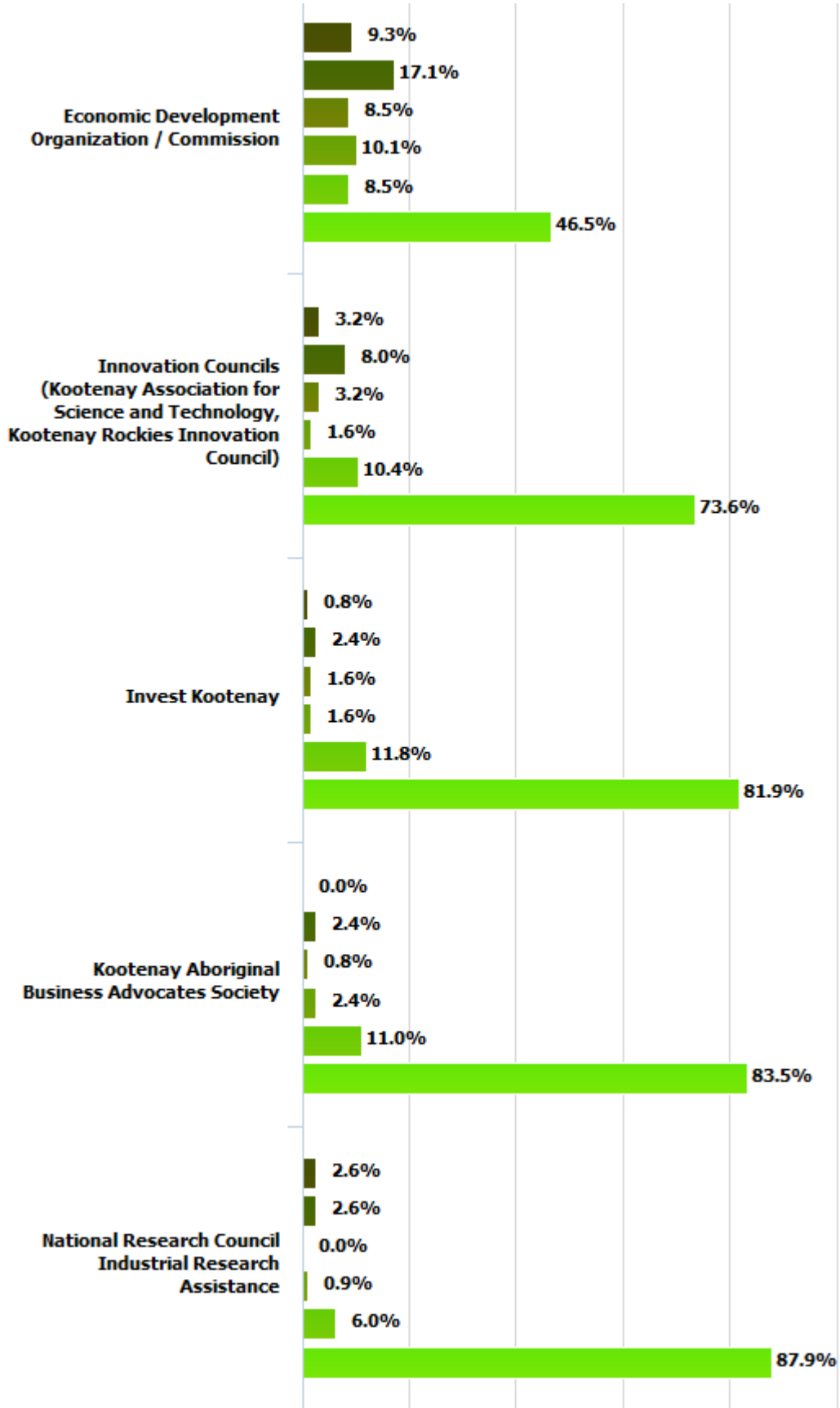
- **Excellent** response (14% or 25 businesses),
- **Good** responses (37% or 64 businesses),
- **Fair** responses (21% or 37 businesses), and
- **Poor** response (11% or 19 businesses),

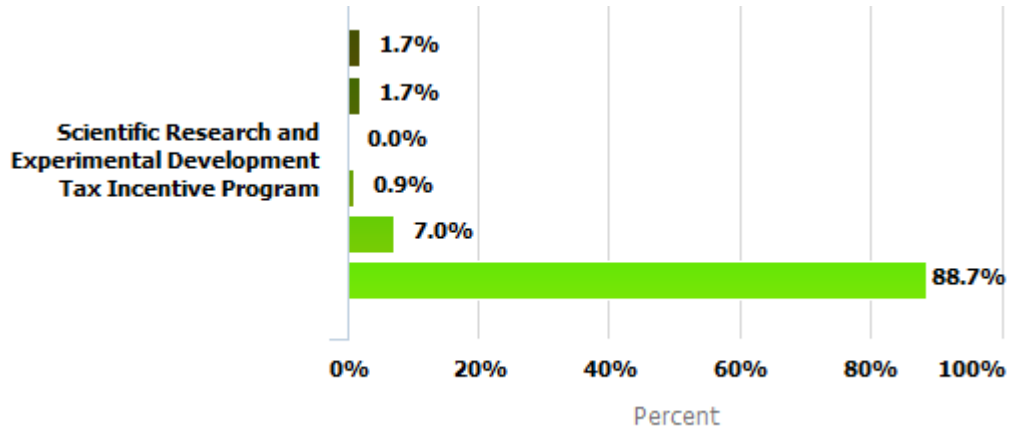
¹³ Response rate regarding Chamber of Commerce was 175. This was 30 responses more than the next most frequently commented upon source (Community Futures), and 50 more responses than the remainder.

Figure 84: Level of service from business support providers

Level of service from business support providers





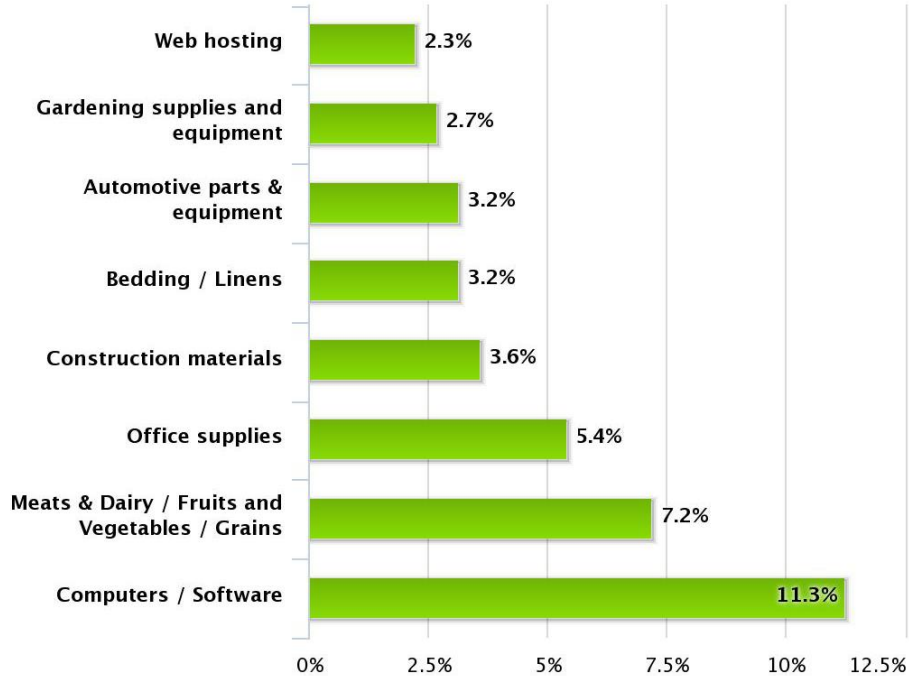


Note: 115-175 respondents

29% of respondents (70 businesses) indicated that there are suppliers that could locate in the region. The most often cited desired product or service was computers/software (11% or 25 businesses). Following computers were: food and food products (7% or 16 businesses), office supplies (5% or 12 businesses), and construction materials (4% or 8 businesses).

Figure 85: Potential Suppliers

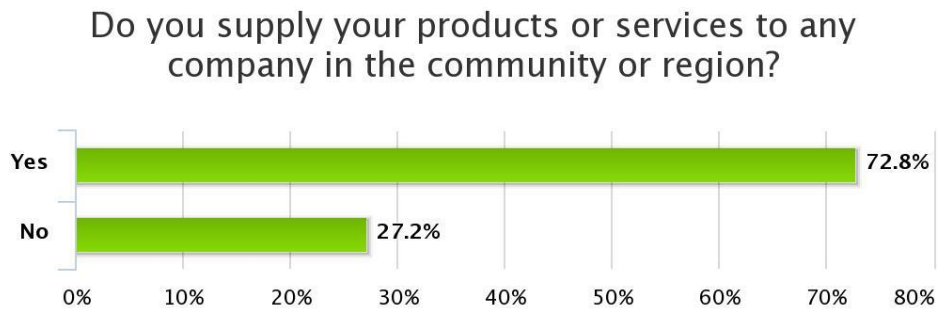
What products or services, if any, are you purchasing from outside the area for which you would like to have a local supplier?



Note: 222 respondents

73% of respondents (110 businesses) indicated that they do supply products or services to companies located in the community or region.

Figure 86: Supply to local companies



Note: 151 respondents

66% of respondents (435 businesses) indicated that there are sectors, businesses or industries that could be attracted to the region. Regional food production, manufacturing, agricultural supplies and mining supplies were the most frequently cited businesses/sectors identified as important to attract. Retail stores, printing suppliers, and green industries followed.

Figure 87: Sectors, businesses or industries that could be attracted to region

Are there suppliers you think could locate in this region?: If Yes, please list



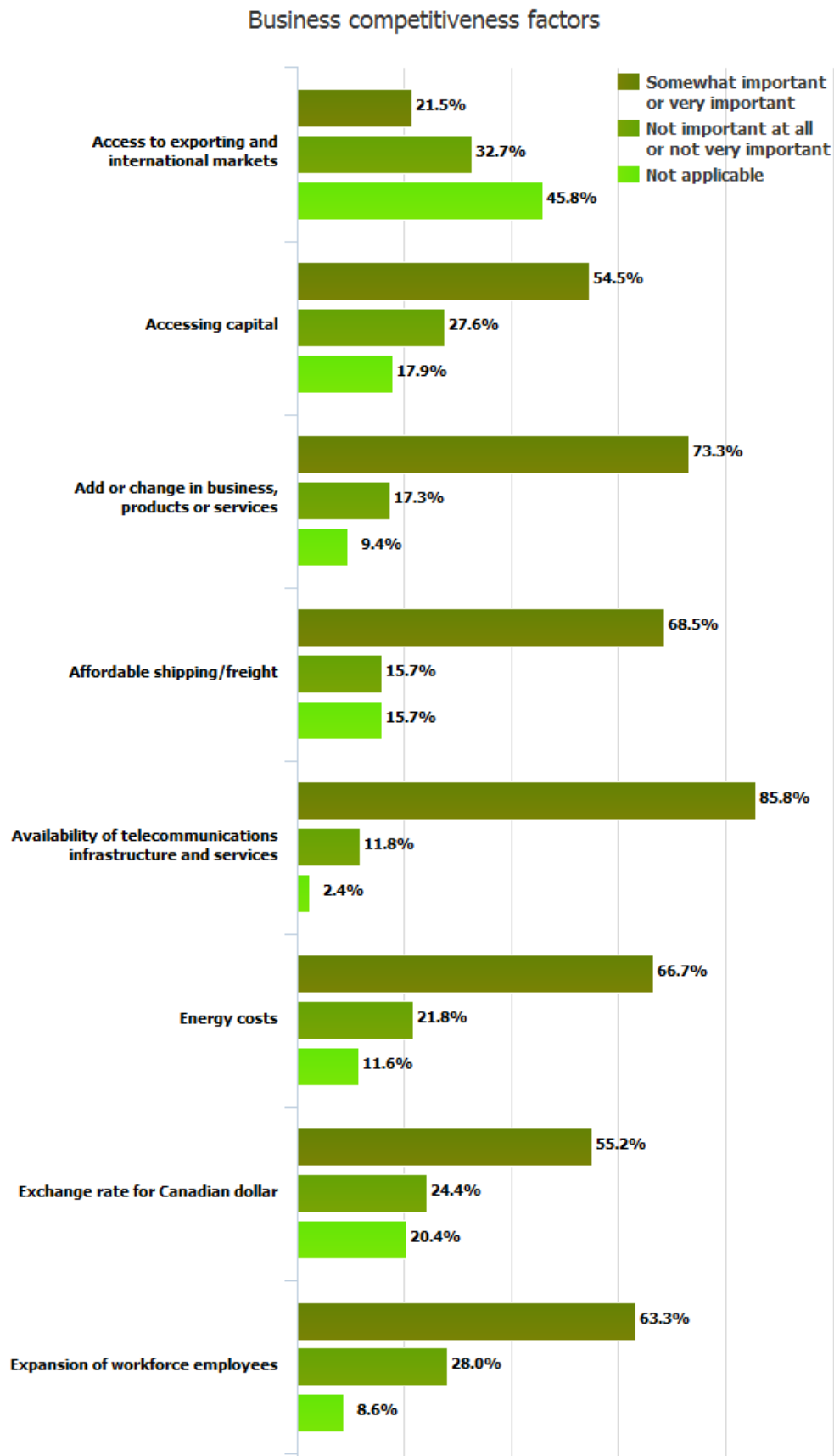
Note: 73 respondents

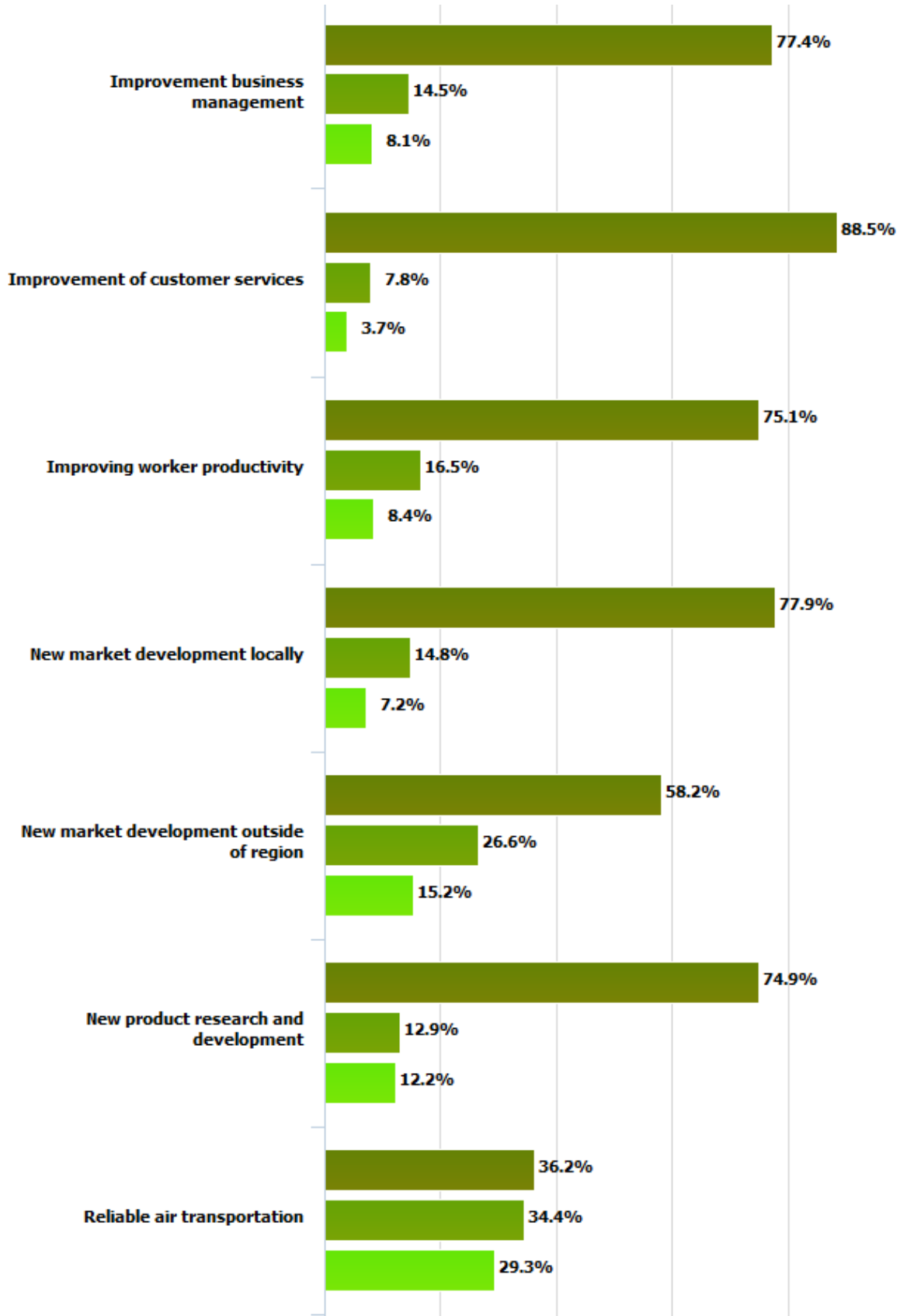
Business Competitiveness and Productivity

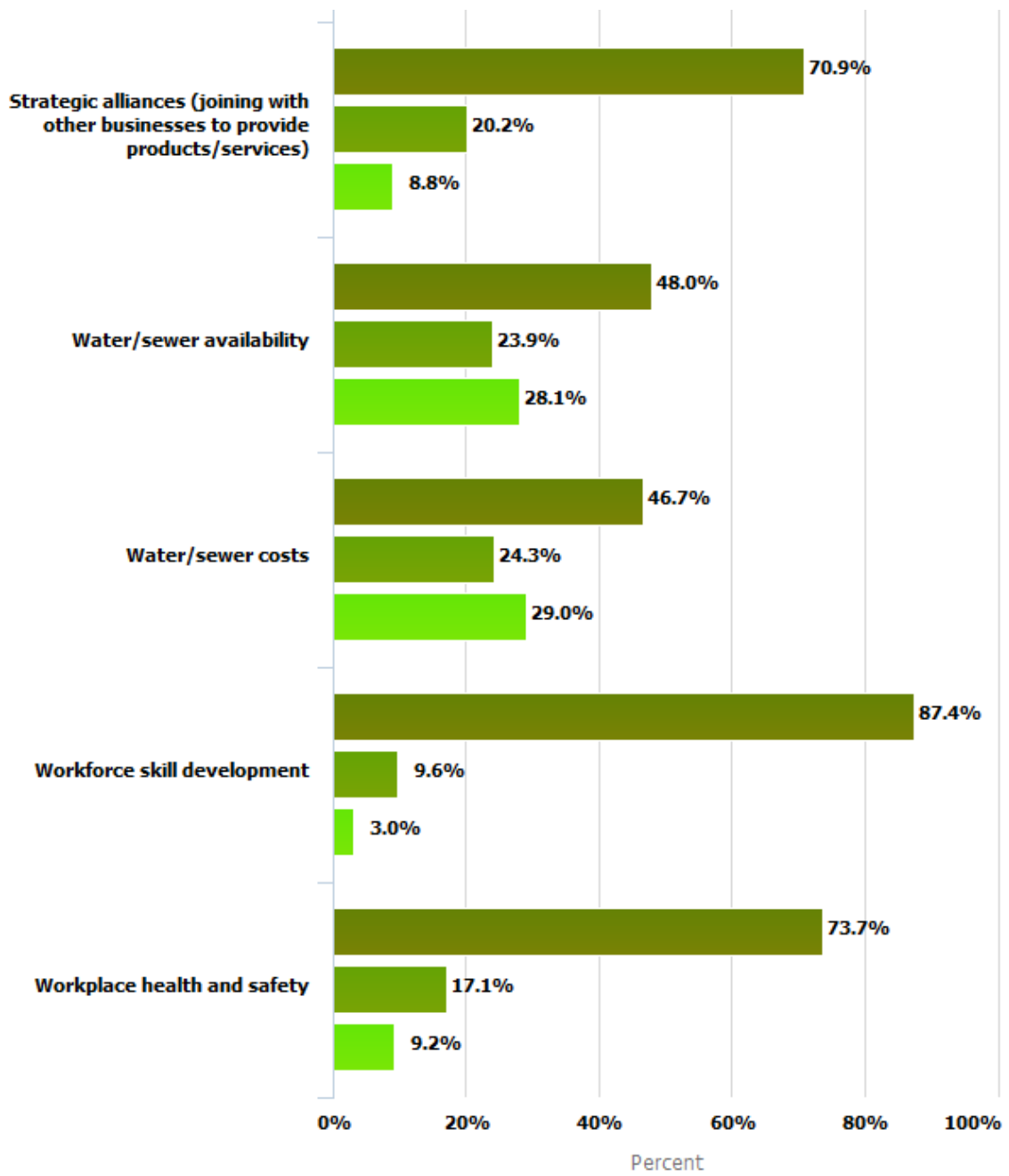
Respondents were asked to rate the importance of various factors for ensuring business competitiveness, over the next five years, as either very important, somewhat important, not very important, not at all important or not applicable to their business.

- The factors that received the highest number of **Not At All Important** ratings included:
 - Accessing International Markets (17% / 85 businesses),
 - Reliable Airport Service (15% or 76 businesses), and
 - Capital Access (11% / 55 businesses).
- The factors that received the highest number of **Not Very Important** ratings included:
 - Reliable Airport Service (19% or 99 businesses),
 - Expanding the Workforce (19% or 97 businesses), and
 - Capital Access (17% / 85 businesses).
- The factors that received the highest number of **Somewhat Important** ratings included:
 - Adding or Changing Products & Services (41% / 211 businesses),
 - Strategic Alliances (39% or 196 businesses), and
 - Expanding the Workforce (36% / 186 businesses).
- The factors that received the highest number of **Very Important** ratings included:
 - Telecommunications (62% / 316 businesses),
 - Customer Service (58% or 298 businesses), and
 - Workforce Skill Development (56% / 283 businesses).
- The factors that received the highest number of **Not Applicable** ratings include:
 - Accessing International Markets (46% / 234 businesses),
 - Reliable Airport Service (29% or 149 businesses), and
 - Water and Sewage Costs (29% / 147 businesses).

Figure 88: Importance of business competitiveness factors





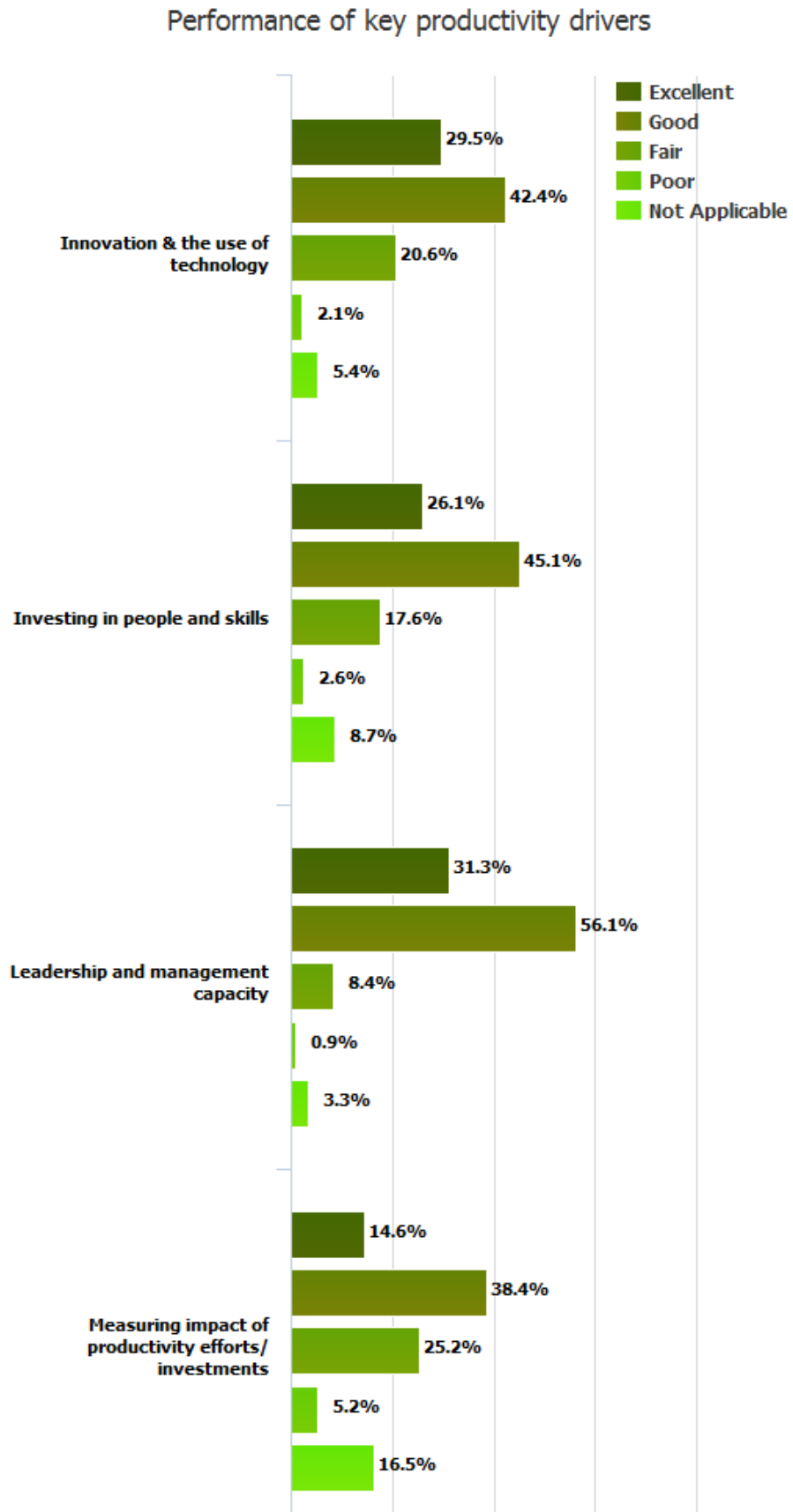


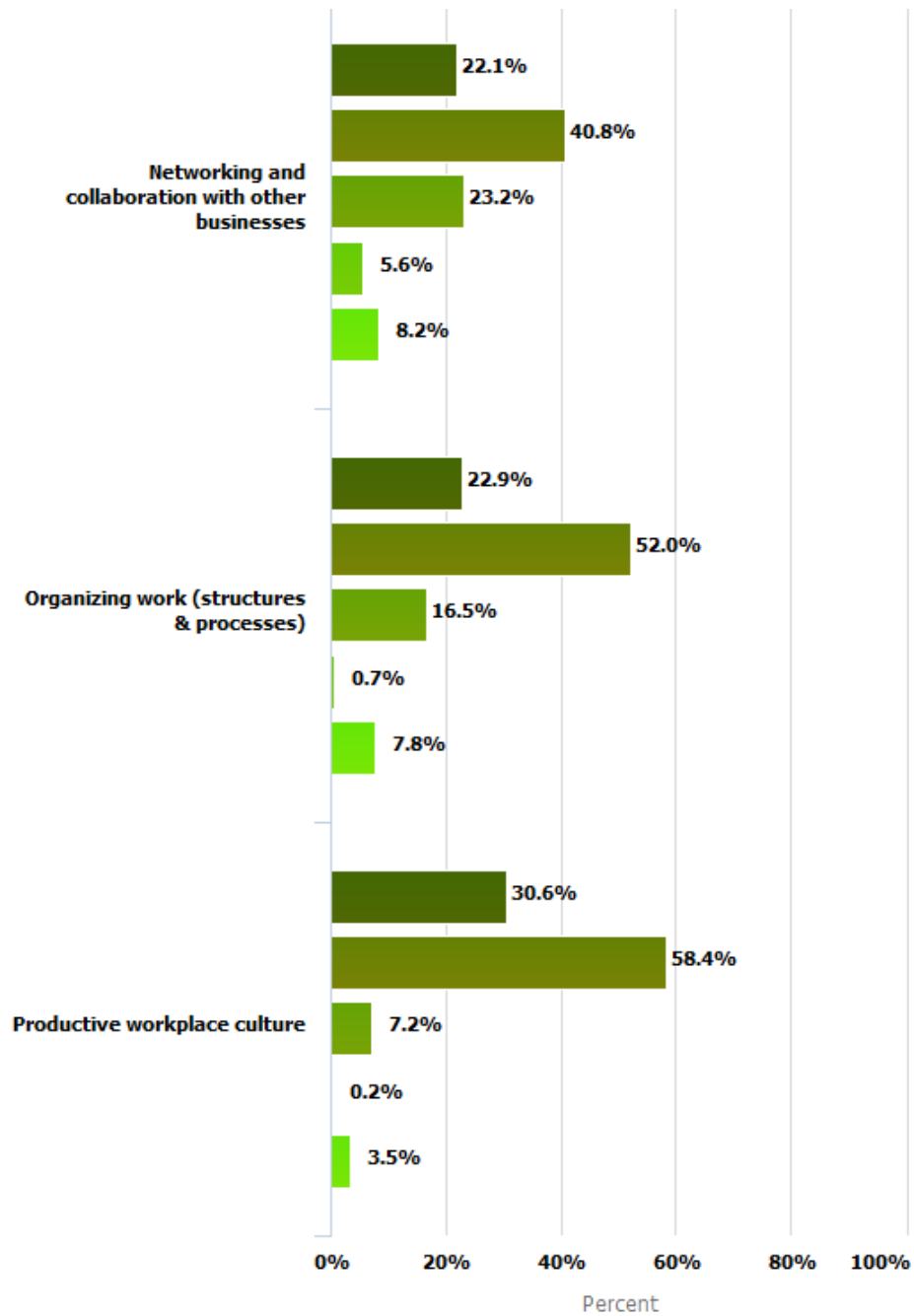
Note: 495-512 respondents

Respondents were asked to rate their business' performance on a list of productivity drivers.

- The drivers that received the highest number of **EXCELLENT** ratings included:
 - Leadership and management capacity (31% or 134 businesses),
 - Productive workplace culture (31% or 131 businesses), and
 - Innovation & the use of technology (30% or 126 businesses).
- The drivers that received the highest number of **GOOD** ratings included:
 - Productive workplace culture (58% or 250 businesses),
 - Leadership and management capacity (56% or 240 businesses), and
 - Organizing work (structures & processes) (52% or 220 businesses).
- The drivers that received the highest number of **FAIR** ratings included:
 - Measuring impact of productivity efforts/investments (25% or 107 businesses),
 - Networking and collaboration with other businesses (23% or 99 businesses), and
 - Innovation & the use of technology (21% or 88 businesses).
- The drivers that received the highest number of **POOR** ratings included:
 - Networking and collaboration with other businesses (6% or 24 businesses),
 - Measuring impact of productivity efforts/investments (5% or 22 businesses), and
 - Investing in people and skills (3% or 11 businesses).
- The drivers that received the highest number of **N/A** ratings included:
 - Measuring impact of productivity efforts/investments (17% or 70 businesses), and
 - Investing in people and skills (9% or 37 businesses).
 - Networking and collaboration with other businesses (8% or 35 businesses),

Figure 89: Performance on key productivity drivers





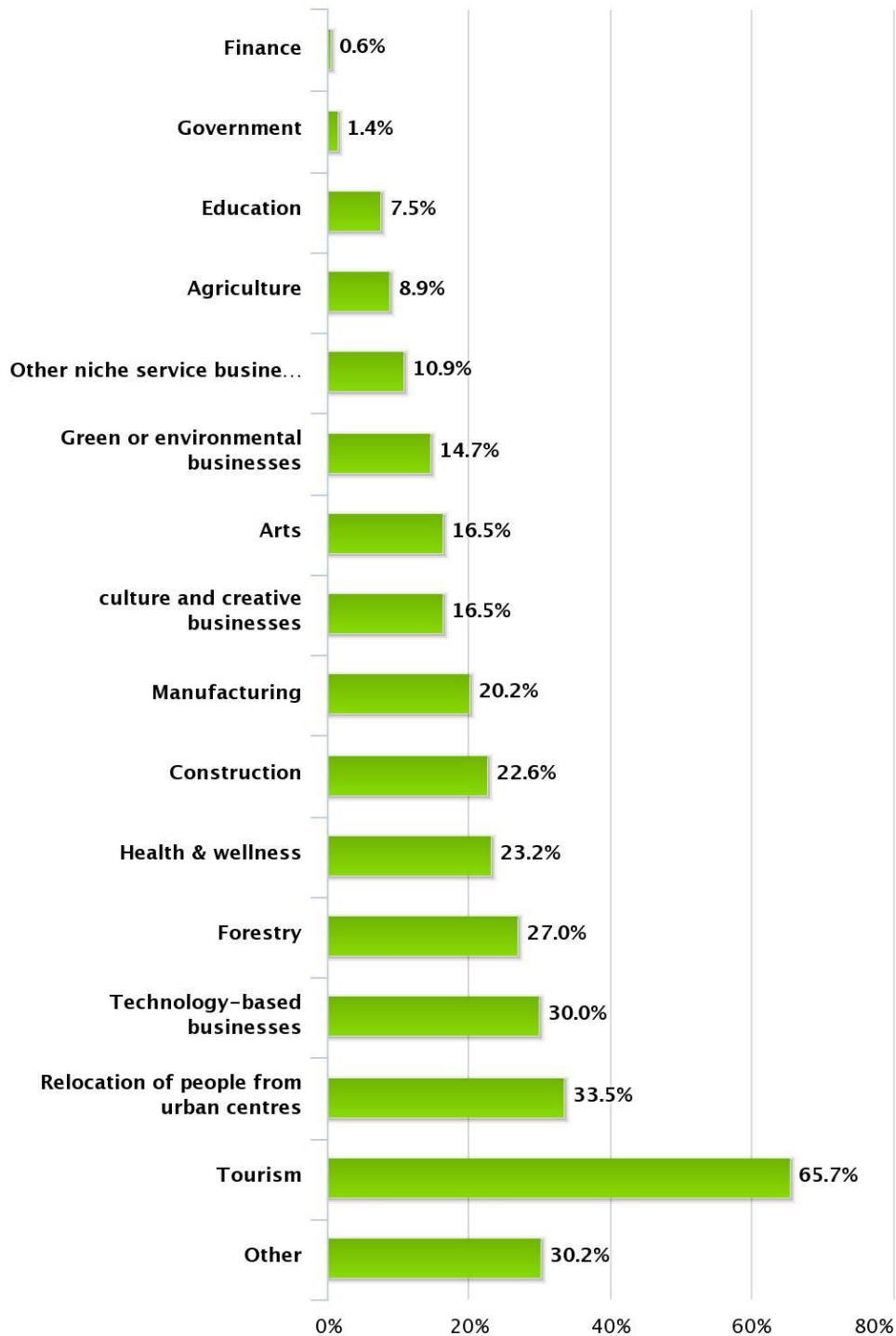
Note: 423-428 respondents

Economic Drivers

Respondents believe that the economic drivers with the highest growth potential over the next 5 to 10 years include tourism (66% or 331 businesses), amenity migration (34% or 169 businesses), and tech-based businesses (30% or 151 businesses). For a list of drivers identified as “Other”, refer to Appendix A (mining was the only significant driver, with 14% or 70 businesses citing it).

Figure 90: Economic drivers with greatest growth potential

Please indicate which economic drivers have the greatest potential for growth in the region over the next 5 to 10 years. (please pick top 3)



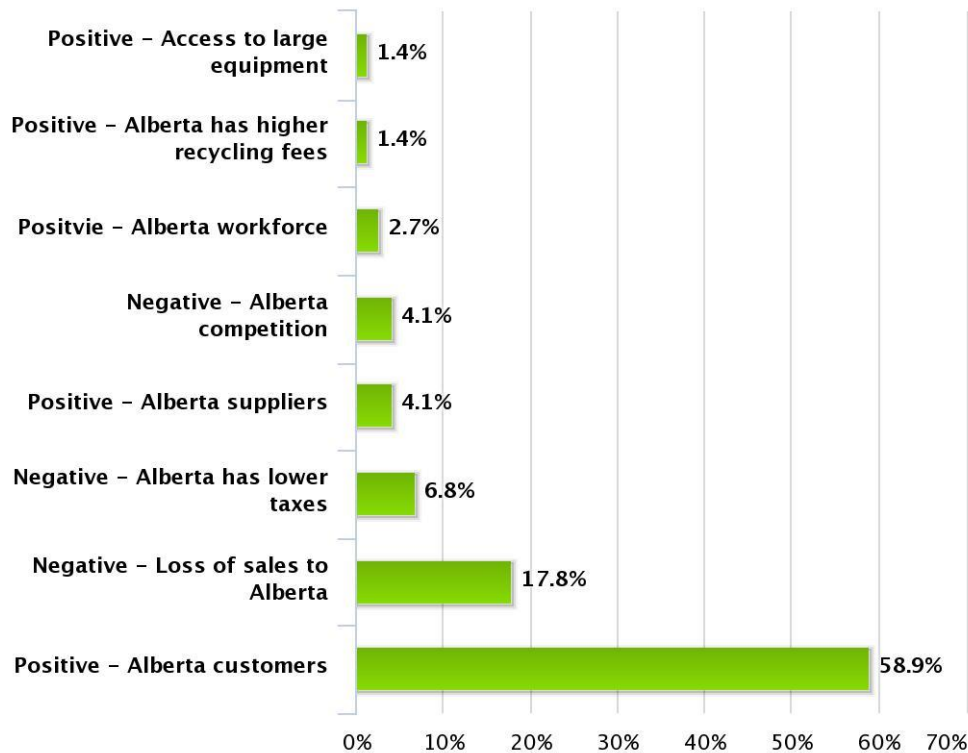
Note: 504 respondents

Proximity to Alberta

75 respondents (66% of question respondents) reported that they were impacted by their proximity to Alberta. Accessing Alberta's customers was the top impact with 59% of respondents citing this as the main impact (43 businesses), while 18% (13 businesses) indicated that loss of sales to Alberta businesses was their biggest impact.

Figure 91: Impact of Proximity to Alberta

Is your business impacted by its proximity to the Alberta border?: If Yes, please explain



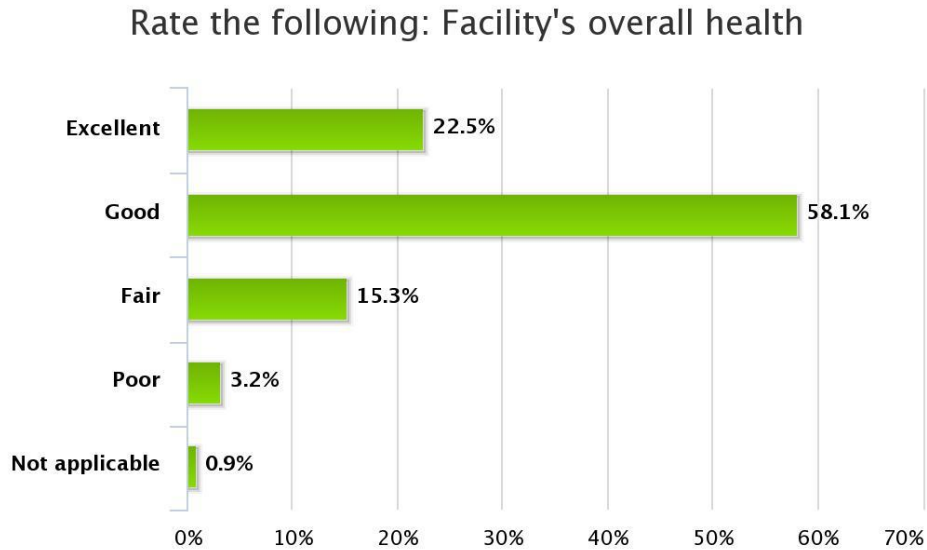
Note: 73 respondents

ASSESSMENT AND PLANS

Overall Health

The majority of businesses surveyed reported that their facility is in overall good health (58% or 398 businesses), 22% (154 businesses) reported that their company's health is excellent and 15% (105 business) reported that it is fair. Only 3% (22) respondents indicated that their company is in poor health.

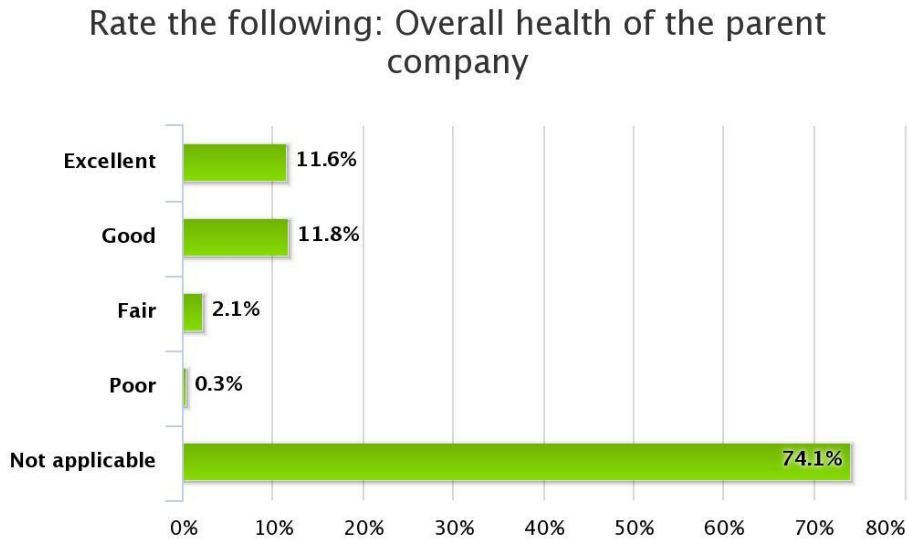
Figure 92: Facility's overall health



Note: 685 respondents

Most businesses with a parent company indicated that the health of that parent company is either excellent (12% or 71 businesses) or good (12% or 72 businesses).

Figure 93: Overall health of parent company

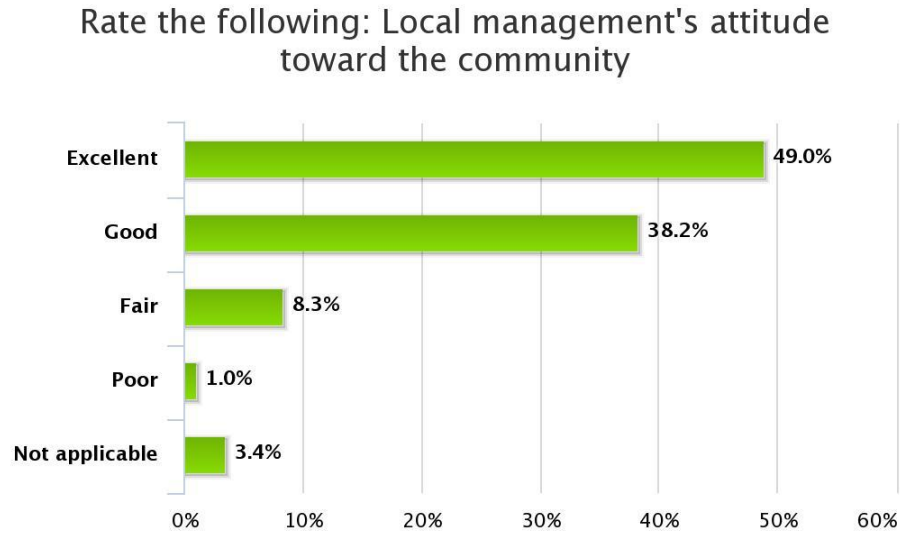


Note: 611 respondents

Attitude toward Community

49% of respondents (329 businesses) indicated that their local management's attitude toward the community is excellent and 38% (257 businesses) indicated that it is good.

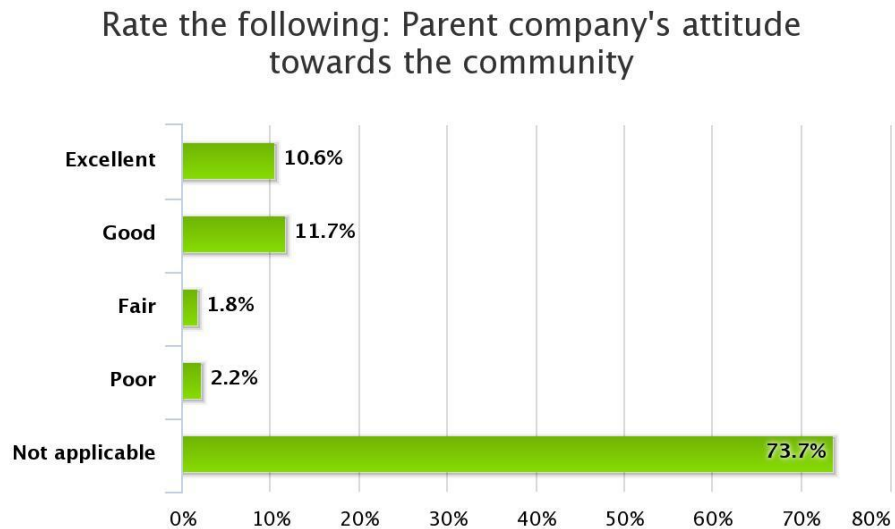
Figure 94: Local management's attitude toward community



Note: 672 respondents

The highest number of respondents (12% or 70 businesses) indicated that their parent company's attitude toward the local community is good. 11% (63 businesses) indicate that it is excellent, 2% each (11 and 13 businesses respectively) indicate that the parent company's attitude toward the community is fair or poor.

Figure 95: Parent company's attitude toward local community

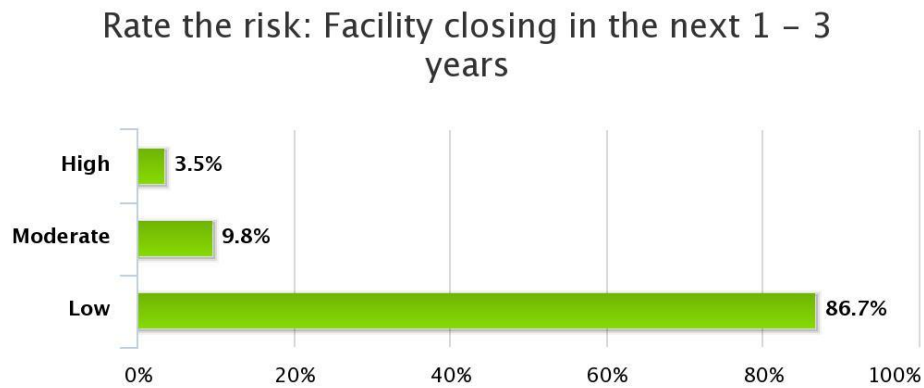


Note: 597 respondents

Risk of Closing or Downsizing

Data indicates that the risk of businesses closing or downsizing is low. Only 4% (25 business) of respondents reported that they are at a high risk of closing or downsizing in the next 1-3 years. Another 10% (70 businesses) say there is a moderate risk, but 87% (619 businesses) claim there is a low risk of closure.

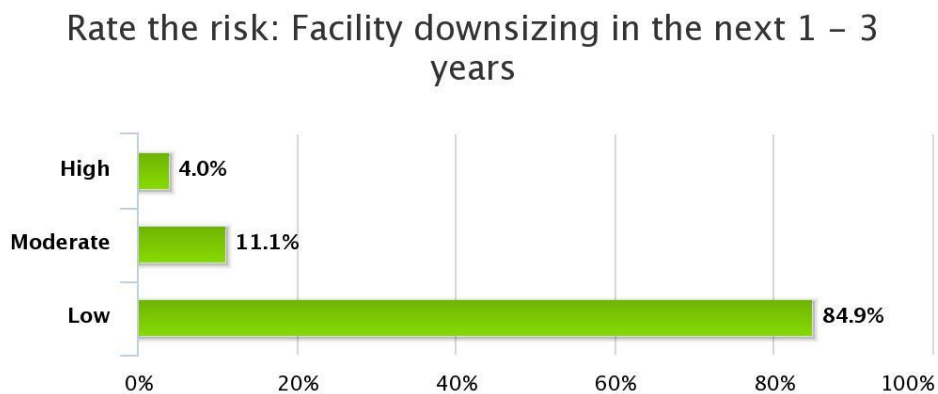
Figure 96: Risk of facility closing



Note: 714 respondents

Similarly, the data indicates that the risk of downsizing is low, with only 4% (28 businesses) indicating that risk is high. 11% (77 businesses) cite a moderate risk, and 85% (591) or respondents say the risk of downsizing is low.

Figure 97: Risk of facility downsizing



Note: 696 respondents

RECOMMENDATIONS

NEXT STEPS

The results of this survey can be used by economic and workforce development organizations throughout the Basin-Boundary region to inform short- and long-term action planning. Comparison of local results to the larger body of evidence may point to potential collaborations and thinking at a regional level. Further, regional governments and institutions with a regional perspective may use this information to inform their policies and activities.

Many BRE actions also lead to long-term programs (e.g., a 'Buy Local' program), or ongoing plans and policies. Patience and a commitment over the long-term are critical in determining the success of these initiatives. For this reason, BRE should be thought of, and implemented as, an on-going process as opposed to a one-time project. Continued support from both the RDI and the CBT will be instrumental to ensuring success over the long-term.

As indicated in the RDI report on BRE Best Practices in the Basin-Boundary, a community's capacity to plan and act strategically is a critical factor in determining the success of a BRE project. Regional level institutions should support the building of a strong economic development culture throughout the Basin-Boundary. This may involve efforts such as: hosting ED 101 learning days across the region, exploration of shared EDO positions for under-served communities, supporting the existing EDP network that works throughout the region, and/or targeted ED related learning opportunities for municipal level staff and officials.

POTENTIAL ACTION AREAS

Local Workforce

Almost 90% of workers are hired locally with roughly 50% expecting recruiting difficulties in the near-term. The most significant workforce gaps seem to be in the service industry (Food & Beverage, Retail, Tourism), trades (mechanics, construction, machine operation), and professional and high-tech fields.

Regional planning stakeholders may wish to focus on the labour market through two principal avenues: information dissemination and training. Assisting both employers and potential employees gather and disseminate information can help ease search costs and direct training needs. Future targeted training and skills development opportunities, informed by research, will help create a workforce that is better prepared to move into the knowledge economy and bolster innovation and productivity.

Other programs or services that reduce the costs and pressures of maintaining employment should also be considered. The top four identified workforce challenges fall into this category. These are: cost of living, housing, child-care, and transportation.

Youth Employment

With just over 7% of the reported jobs being 'entry-level' in nature, it is not surprising to see that only 8% of the regional workforce is in the 'under 25' age category. This is, of course, tied to the regional demographic trend which sees a general out-migration of young adults (20 – 24).

Regional stakeholders should be looking at youth focused actions that ensure we have sufficient opportunities for our young adults. The general workforce action areas may all be applied with a youth focus. Developing apprenticeship/training/grooming programs that encourage regional businesses to spend some of their resources bringing up the younger workforce would be helpful. This would help create a collective culture of training and workforce development.

Business Growth & Expansion

49% of businesses in the region report being in a growth cycle, and 49% indicate that they are planning to expand within the next three years. Roughly 32% of those businesses planning to expand do not feel their existing site is adequate, and 86% of expansion plans are expected to occur within the community. Businesses also report that current and expected future employment levels are stable or increasing. This data coupled with the general positive business climate and the optimism for the future provides a positive report on local business growth.

Actions in this area could include supporting existing businesses as they plan for local expansion/growth. Assistance could come in the form of navigating local regulations, identifying and securing new sites, and connecting businesses with resources to assist in expansion projects. It is worth noting that very few businesses sought assistance with expansion efforts from an external organisation. This is an area where improvements could be made to have local resources approach businesses proactively to understand barriers and work collaboratively towards solutions.

EDPs and other business supports could anticipate the need to respond to stated barriers to expansion, which include: access to finance, lack of skilled staff and lack of suitable premises.

Supply Sourcing and Procurement

A hefty majority (69%) of sales are generated from the local or regional economy. However, companies spread their procurement much further afield, with only 29% of supplies sourced from within the region. It seems our region faces supply chain and value chain problems; we buy from outside, but sell within.

The most common response (84%) for the reason why supplies are sourced outside of the local area is that they are not available locally. While it will not be universally true, this clearly indicates that there are opportunities for both new product/service development and business expansion within the region. EDOs and EDPs, at the local or sub-regional level, may wish to start analysing sectors of interest to identify market opportunities for the region's businesses.

Local businesses do not appear to engage with government procurement processes, with only 29% of businesses indicated that they have. A significant number of non-responses (372 businesses) suggest there may be a lack of awareness of the opportunities available through

government procurement. Education and awareness of the opportunities available through municipal, regional, and provincial procurement processes could be promoted through seminars, profiles in communication material, and promotion on relevant websites.

Training

While the region's colleges received passing grades from business, availability of: safety (first-aid, food safety etc.), sales and marketing, business management, technical training and emerging industry practices were identified. Findings indicate that the majority (53%) of businesses do have a training budget, but they have no discernible preference for delivery methods (in-class, one-on-one, workshops etc.). Future initiatives could include supporting networks to help businesses identify shared training needs, and working with educational institutions to ensure local skill requirements are considered in programming.

Succession and Business Planning

Business and succession planning are critical to the health and longevity of businesses. 16% of Basin-Boundary businesses planning to exit their business in the intermediate future. 17% of respondents indicated that they have a formal succession plan and just over half have an up-to-date business plan. Furthermore, business and management training was among the top cited areas of training needs.

Findings suggest that there are opportunities to support the business community by providing succession and business planning assistance. Given the importance of individual circumstances, and the primacy of privacy, in business and succession planning, and a stated preference for individual coaching, one-on-one assistance program could result in greater overall benefit by providing a higher level of support to businesses and generating greater uptake. Any future planning support initiatives should be aggressively advertised to ensure uptake among local businesses, and may include direct outreach to those businesses identified as part of the BRE survey.

Government Services

Two primary themes emerged in the criticisms of government services and infrastructure: insufficiency of transportation infrastructure, and difficulty in accessing space to expand existing businesses. Criticisms around transportation identified airport services, ground transportation services, telecommunications and warehousing as insufficient. Criticisms around expansion focus on the availability of appropriately zoned lands, development approval processes and availability of rental or lease space.

With roughly \$420M in potential investments waiting to happen, there is an opportunity for local government to work with local businesses to understand existing and future business needs and assess land use planning at a micro level. Issues around the perceived lack of available land and servicing costs may be addressed through communication strategies between the local government, local businesses and the community. Opportunities may exist locally for changes to land use designations and zoning that could serve both the greater community and local businesses. Collaboration and dialogue with targeted businesses could produce valuable results and innovative solutions.

The issues around transportation and communications infrastructure have been long identified. While work is ongoing to address these issues, stakeholders should take confidence that their actions will have an effect and be appreciated. Opportunities for collaboration and collective action should be sought, and public-private partnerships may be explored.

APPENDIX A: DATA TABLES

COMPANY INFORMATION

| | | Count | Percent of Question Respondents |
|--|-------|-------|---------------------------------|
| Industry Classification | NAICS | | |
| Agriculture, forestry, fishing and hunting | 11 | 24 | 3.02% |
| Mining, quarrying, and oil and gas extraction | 21 | 5 | 0.63% |
| Utilities | 22 | 3 | 0.38% |
| Construction | 23 | 41 | 5.16% |
| Manufacturing | 31-33 | 94 | 11.82% |
| Retail and Wholesale Trade | 41-45 | 195 | 24.53% |
| Transportation and Warehousing | 48-49 | 10 | 1.26% |
| Information and Cultural Industries | 51 | 52 | 6.54% |
| Finance and Insurance | 52 | 24 | 3.02% |
| Real Estate and Rental and Leasing | 53 | 21 | 2.64% |
| Professional, Scientific and Technical Services | 54 | 97 | 12.20% |
| Administrative Support, Waste Management and Remediation | 56 | 6 | 0.75% |
| Educational Services | 61 | 4 | 0.50% |
| Health Care and Social Assistance | 62 | 21 | 2.64% |
| Arts, Entertainment and Recreation | 71 | 39 | 4.91% |
| Accommodation and Food Services | 72 | 97 | 12.20% |
| Other Services | 81 | 60 | 7.55% |
| Public Administration | 91-92 | 2 | 0.25% |
| Total | | 795 | 100.00% |

| | |
|-----------------------|------|
| Survey Participants: | 795 |
| Question Respondents: | 795 |
| No Response Count: | 0 |
| Response Rate: | 100% |

| | Count | Percent of Question Respondents |
|---|-------|---------------------------------|
| Functions located at this facility | | |
| Engineering/RD | 76 | 15.77% |
| Manufacturing | 99 | 20.54% |
| Warehousing | 99 | 20.54% |
| Distribution | 122 | 25.31% |
| Headquarters | 180 | 37.34% |
| Services | 410 | 85.06% |
| Total | 986 | |

Survey Participants: 795

Question Respondents: 482

No Response Count: 313

Response Rate: 61%

| | Count | Percent of Question Respondents |
|---|-------|---------------------------------|
| Who are your competitors?: Where are your competitors located? | | |
| Outside Canada | 19 | 12.18% |
| In Canada | 22 | 14.10% |
| In Province | 139 | 89.10% |
| Total | 180 | |

Survey Participants: 795

Question Respondents: 156

No Response Count: 639

Response Rate: 20%

FACTORS FOR SUCCESS

| | Count | Percent of Question Respondents |
|---|------------|---------------------------------|
| What are the factors that make your company successful here? | | |
| Advertising | 1 | 0.15% |
| Customer Service | 1 | 0.15% |
| Road construction | 1 | 0.15% |
| Mining | 2 | 0.30% |
| Branding | 5 | 0.75% |
| Deversified services | 6 | 0.90% |
| Natural resources | 7 | 1.05% |
| Niche product | 8 | 1.20% |
| Demand for products and services | 14 | 2.11% |
| Technical expertise | 14 | 2.11% |
| Hard work | 15 | 2.26% |
| Tourism | 15 | 2.26% |
| Community support | 17 | 2.56% |
| Workforce / Staff | 20 | 3.01% |
| Networking | 21 | 3.16% |
| Word of mouth | 26 | 3.91% |
| Competitive pricing | 29 | 4.36% |
| Experience | 30 | 4.51% |
| Knowledge | 36 | 5.41% |
| Lack of competition | 36 | 5.41% |
| Reputation | 38 | 5.71% |
| Established business | 40 | 6.02% |
| Location | 74 | 11.13% |
| Customer service | 85 | 12.78% |
| Quality product / service | 86 | 12.93% |
| Total | 627 | |

Survey Participants: 795

Question Respondents: 665

No Response Count: 130

Response Rate: 84%

LOCATION

| | Count | Percent of Question Respondents |
|---|-------|---------------------------------|
| Location of company's headquarters | | |
| Outside Canada | 18 | 3.87% |
| Elsewhere in nation | 43 | 9.25% |
| In Province | 404 | 86.88% |
| Total | 465 | |

Survey Participants: 795
 Question Respondents: 465
 No Response Count: 330
 Response Rate: 58%

| | Count | Percent of Question Respondents |
|---|-------|---------------------------------|
| Location of company's headquarters: Province | | |
| AL | 1 | 0.64% |
| CA | 1 | 0.64% |
| MB | 1 | 0.64% |
| MS | 1 | 0.64% |
| OR | 1 | 0.64% |
| SK | 1 | 0.64% |
| WI | 1 | 0.64% |
| QC | 4 | 2.55% |
| ON | 7 | 4.46% |
| AB | 11 | 7.01% |
| BC | 128 | 81.53% |
| Total | 157 | |

Survey Participants: 795
 Question Respondents: 157
 No Response Count: 638
 Response Rate: 20%

| | Count | Percent of Question Respondents |
|---|-------|---------------------------------|
| Location of company's headquarters: Nation | | |
| Australia | 1 | 0.68% |
| Belgium | 1 | 0.68% |
| United Kingdom | 1 | 0.68% |
| United States | 10 | 6.76% |
| Canada | 135 | 91.22% |
| Total | 148 | |

Survey Participants: 795
 Question Respondents: 148
 No Response Count: 647
 Response Rate: 19%

| | Count | Percent of Question Respondents |
|---|-------|---------------------------------|
| Does this company have another location elsewhere? | | |
| Yes | 149 | 28.22% |
| No | 379 | 71.78% |
| Total | 528 | |

Survey Participants: 795
 Question Respondents: 528
 No Response Count: 267
 Response Rate: 66%

| | Count | Percent of Question Respondents |
|---|-------|---------------------------------|
| Does this company have another location elsewhere?: If Yes, where? | | |
| Outside Canada | 8 | 17.78% |
| Elsewhere in nation | 19 | 42.22% |
| In Province | 35 | 77.78% |
| Total | 62 | |

Survey Participants: 795
 Question Respondents: 45
 No Response Count: 104
 Parent Question 'Yes' Respondents: 149
 Parent Question Respondents: 528
 Response Rate: 30%

| | Count | Percent of Question Respondents |
|--|-------|---------------------------------|
| Corporate headquarters location, if different than local location | | |
| China | 1 | 7.69% |
| United States | 1 | 7.69% |
| Canada | 11 | 84.62% |
| Total | 13 | |

Survey Participants: 795
 Question Respondents: 13
 No Response Count: 136
 Parent Question 'Yes' Respondents: 149
 Parent Question Respondents: 528
 Response Rate: 9%

| | Count | Percent of Question Respondents |
|---|--------------|--|
| Why did you choose this community to locate your business? | | |
| Bought an existing business | 1 | 0.61% |
| Great community | 1 | 0.61% |
| Moved business when husband relocated | 1 | 0.61% |
| Moved here to manage the business | 1 | 0.61% |
| Only insurance company in town | 1 | 0.61% |
| Opening a business here was a natural fit | 1 | 0.61% |
| Traditional place of residence | 1 | 0.61% |
| Transferred here from original company | 1 | 0.61% |
| Understanding of the business | 1 | 0.61% |
| Business expansion | 2 | 1.22% |
| Connections to the community | 2 | 1.22% |
| Hobby turned into a business | 2 | 1.22% |
| Natural resources | 6 | 3.66% |
| Established business | 8 | 4.88% |
| Proximity to mines | 9 | 5.49% |
| Lifestyle | 11 | 6.71% |
| Born and raised here | 13 | 7.93% |
| Demand for products and services | 15 | 9.15% |
| Market growth | 15 | 9.15% |
| Already living here | 17 | 10.37% |
| Close to family | 17 | 10.37% |
| Location | 17 | 10.37% |
| Saw a business opportunity | 28 | 17.07% |
| Total | 171 | |

Survey Participants: 795
 Question Respondents: 164
 No Response Count: 631
 Response Rate: 21%

AGE AND LIFE CYCLE STAGE

| | Count | Percent of Question Respondents |
|---|-------|---------------------------------|
| Life cycle stage of firm's primary product/service | | |
| Declining | 38 | 5.01% |
| Emerging | 72 | 9.50% |
| Growing | 373 | 49.21% |
| Maturing | 275 | 36.28% |
| Total | 758 | |

Survey Participants: 795
 Question Respondents: 758
 No Response Count: 37
 Response Rate: 95%

| | Count | Percent of Question Respondents |
|--|-------|---------------------------------|
| How long has this facility operated | | |
| <1 Year | 38 | 4.94% |
| 1-4 Years | 128 | 16.62% |
| 5-9 Years | 138 | 17.92% |
| 10-19 Years | 181 | 23.51% |
| >20 Years | 285 | 37.01% |
| Total | 770 | |

Survey Participants: 795
 Question Respondents: 770
 No Response Count: 25
 Response Rate: 97%

OWNERSHIP AND MANAGEMENT

| | Count | Percent of Question Respondents |
|---|-------|---------------------------------|
| What is this company's ownership status? | | |
| Publicly owned | 60 | 8.78% |
| Privately owned | 623 | 91.22% |
| Total | 683 | |

Survey Participants: 795
 Question Respondents: 683
 No Response Count: 112
 Response Rate: 86%

| | Count | Percent of Question Respondents |
|---|-------|---------------------------------|
| What is this company's legal status? | | |
| Limited liability partnership (LLP) | 25 | 3.22% |
| Non-profit | 32 | 4.12% |
| Partnership | 81 | 10.42% |
| Sole proprietorship | 220 | 28.31% |
| Corporation | 400 | 51.48% |
| Other | 19 | 2.45% |
| Total | 777 | |

Survey Participants: 795
 Question Respondents: 777
 No Response Count: 18
 Response Rate: 98%

| | Count | Percent of Question Respondents |
|--|-----------|---------------------------------|
| What is this company's legal status?: If <i>Other</i>, please specify | | |
| Family Trust | 1 | 0.13% |
| Farm | 1 | 0.13% |
| Independent | 1 | 0.13% |
| Labour organisation | 1 | 0.13% |
| Limited company | 1 | 0.13% |
| Municipal Government | 1 | 0.13% |
| Registered Charity (CRA) | 1 | 0.13% |
| Unlimited | 1 | 0.13% |
| Sole proprietorship | 2 | 0.26% |
| Corporation | 4 | 0.51% |
| Non-profit | 4 | 0.51% |
| Cooperative | 8 | 1.03% |
| Total | 26 | |

Survey Participants: 795
Question Respondents: 26
No Response Count: 0
Parent Question 'Other' Respondents: 19
Parent Question Respondents: 777
Response Rate: 100%

| | Count | Percent of Question Respondents |
|---|------------|---------------------------------|
| Has the local facility changed owners or managers in the past 5 years? | | |
| Yes | 175 | 25.40% |
| No | 514 | 74.60% |
| Total | 689 | |

Survey Participants: 795
Question Respondents: 689
No Response Count: 106
Response Rate: 87%

| | Count | Percent of Question Respondents |
|--|-------|---------------------------------|
| If Yes, describe the local impact of the change | | |
| Negative | 6 | 3.55% |
| Neutral | 28 | 16.57% |
| Positive | 135 | 79.88% |
| Total | 169 | |

Survey Participants: 795
 Question Respondents: 169
 No Response Count: 6
 Parent Question 'Yes' Respondents: 175
 Parent Question Respondents: 689
 Response Rate: 97%

| | Count | Percent of Question Respondents |
|--|-------|---------------------------------|
| Is an ownership change pending for this facility? | | |
| Yes | 125 | 16.47% |
| No | 634 | 83.53% |
| Total | 759 | |

Survey Participants: 795
 Question Respondents: 759
 No Response Count: 36
 Response Rate: 95%

| | Count | Percent of Question Respondents |
|--|-------|---------------------------------|
| If Yes what is the anticipated time frame | | |
| 1 year or less | 30 | 28.30% |
| 2 years | 22 | 20.75% |
| 3 years or more | 54 | 50.94% |
| Total | 106 | |

Survey Participants: 795
 Question Respondents: 106
 No Response Count: 19
 Parent Question 'Yes' Respondents: 125
 Parent Question Respondents: 759
 Response Rate: 85%

| | Count | Percent of Question Respondents |
|--|--------------|--|
| If Yes, how do you intend to exit the business? | | |
| Close the business down | 3 | 2.78% |
| Sell/transfer to a family member | 18 | 16.67% |
| Sell to another company | 19 | 17.59% |
| Sell/transfer to a non-family member | 49 | 45.37% |
| Other | 19 | 17.59% |
| Total | 108 | |

Survey Participants: 795
 Question Respondents: 108
 No Response Count: 17
 Parent Question 'Yes' Respondents: 125
 Parent Question Respondents: 759
 Response Rate: 86%

| | Count | Percent of Question Respondents |
|---|-------|---------------------------------|
| If Yes, how do you intend to exit the business?: If <i>other</i>, please explain | | |
| Being bought out | 1 | 0.93% |
| Change in board | 1 | 0.93% |
| Change in partnership | 1 | 0.93% |
| Loss of partner | 1 | 0.93% |
| New franchise owner | 1 | 0.93% |
| Sell to larger company | 1 | 0.93% |
| Sell or close down | 1 | 0.93% |
| Sell the building | 1 | 0.93% |
| Sell to family member | 1 | 0.93% |
| Start new | 1 | 0.93% |
| Advertise for a business partner | 2 | 1.85% |
| Changing to corpotation | 2 | 1.85% |
| Don't know | 5 | 4.63% |
| Total | 19 | |

Survey Participants: 795
Question Respondents: 19
No Response Count: 0
Parent Question 'Other' Respondents: 19
Parent Question Respondents: 108
Response Rate: 86%

SUCCESSION AND BUSINESS PLANS

| | Count | Percent of Question Respondents |
|--|-------|---------------------------------|
| Have you identified a successor to your business? | | |
| Yes | 99 | 15.97% |
| No | 521 | 84.03% |
| Total | 620 | |

Survey Participants: 795
 Question Respondents: 620
 No Response Count: 175
 Response Rate: 78%

| | Count | Percent of Question Respondents |
|---|-------|---------------------------------|
| Is there a formal succession plan? | | |
| Yes | 114 | 17.40% |
| No | 467 | 71.30% |
| Not applicable | 74 | 11.30% |
| Total | 655 | |

Survey Participants: 795
 Question Respondents: 655
 No Response Count: 140
 Response Rate: 82%

| | Count | Percent of Question Respondents |
|--|-------|---------------------------------|
| If Yes, have you been assisted in preparation of a succession plan? | | |
| Yes | 67 | 68.37% |
| No | 31 | 31.63% |
| Total | 98 | |

Survey Participants: 795
 Question Respondents: 98
 No Response Count: 16
 Parent Question 'Yes' Respondents: 114
 Parent Question Respondents: 655
 Response Rate: 86%

| | Count | Percent of Question Respondents |
|-----------------------------------|-------|---------------------------------|
| If Yes, by whom | | |
| Banker | 2 | 3.85% |
| Spouse | 2 | 3.85% |
| Personal financial planner | 3 | 5.77% |
| Business partner | 5 | 9.62% |
| Accountant | 10 | 19.23% |
| Lawyer | 12 | 23.08% |
| Other | 16 | 30.77% |
| Total | 50 | |

Survey Participants: 795
Question Respondents: 52
No Response Count: 15
Parent Question 'Yes' Respondents: 67
Parent Question Respondents: 98
Response Rate: 78%

| | Count | Percent of Question Respondents |
|--|-------|---------------------------------|
| If Yes, by whom: If <i>other</i>, please explain | | |
| Accountant, Lawyer, and CBT (BBA) | 1 | 1.92% |
| All of the Above | 1 | 1.92% |
| Asked for help from Local Govt | 1 | 1.92% |
| Board of directors | 1 | 1.92% |
| Caldwell banker | 1 | 1.92% |
| Canadian Independent Federation of Businesses (guide) | 1 | 1.92% |
| Consultant / industry groups | 1 | 1.92% |
| CoreLogic - In house not local in Nelson | 1 | 1.92% |
| Lawyer, Accountant, Financial Planner | 1 | 1.92% |
| Tim Horton's succession plan department | 1 | 1.92% |
| consultant | 1 | 1.92% |

| | Count | Percent of Question Respondents |
|--|-------|---------------------------------|
| If Yes, by whom: If other, please explain | | |
| head office | 1 | 1.92% |
| regional district manager of Marks | 1 | 1.92% |
| workshops | 1 | 1.92% |
| KAST Mentorship program | 2 | 3.85% |
| Total | 16 | |

Survey Participants: 795
Question Respondents: 29
No Response Count: 0
Parent Question 'Other' Respondents: 16
Parent Question Respondents: 52
Response Rate: 78%

| | Count | Percent of Question Respondents |
|---|-------|---------------------------------|
| Does this firm have a current written business plan? | | |
| Yes | 383 | 56.66% |
| No | 293 | 43.34% |
| Total | 676 | |

Survey Participants: 795
Question Respondents: 676
No Response Count: 119
Response Rate: 85%

WORKFORCE

SIZE

| | Count | Percent of Question Respondents |
|------------------------------------|-------|---------------------------------|
| Historical employment trend | | |
| Declining | 111 | 16.32% |
| Staying the same | 330 | 48.53% |
| Increasing | 239 | 35.15% |
| Total | 680 | |

Survey Participants: 795

Question Respondents: 680

No Response Count: 115

Response Rate: 86
%

| | Count | Percent of Question Respondents |
|-----------------------------|-------|---------------------------------|
| Nature of Employment | | |
| Full Time | 11844 | 73.77% |
| Part Time | 2567 | 15.99% |
| Temporary | 1645 | 10.25% |
| Total | 16056 | |

Survey Participants: 795

Question Respondents: 782

Response Rate: 98.36%

| | Count | Percent of Question Respondents |
|---|-------|---------------------------------|
| Total number of employees at this facility*: Total employees | | |
| Less than 5 | 373 | 47.70% |
| 5-9 | 190 | 24.30% |
| 10-19 | 103 | 13.17% |
| 20-49 | 78 | 9.97% |

| | Count | Percent of Question Respondents |
|---|-------|---------------------------------|
| Total number of employees at this facility*: Total employees | | |
| 50-99 | 21 | 2.69% |
| Over 100 | 17 | 2.17% |
| Total | 782 | |

Total employees: 16056
 Survey Participants: 795
 Question Respondents: 782
 No Response Count: 13
 Response Rate: 98%

| | Count | Percent of Question Respondents |
|---|-------|---------------------------------|
| Total number of employees at this facility*: Full-time employees | | |
| Less than 5 | 485 | 66.35% |
| 5-9 | 117 | 16.01% |
| 10-19 | 53 | 7.25% |
| 20-49 | 52 | 7.11% |
| 50-99 | 10 | 1.37% |
| Over 100 | 14 | 1.92% |
| Total | 731 | |

Total full-time employees: 11844
 Survey Participants: 795
 Question Respondents: 731
 No Response Count: 64
 Response Rate: 92%

| | Count | Percent of Question Respondents |
|---|------------|---------------------------------|
| Total number of employees at this facility*: Part-time employees | | |
| Less than 5 | 462 | 80.77% |
| 5-9 | 55 | 9.62% |
| 10-19 | 38 | 6.64% |
| 20-49 | 13 | 2.27% |
| 50-99 | 2 | 0.35% |
| Over 100 | 2 | 0.35% |
| Total | 572 | |

Total part-time employees: 2567
 Survey Participants: 795
 Question Respondents: 572
 No Response Count: 223
 Response Rate: 72%

| | Count | Percent of Question Respondents |
|---|------------|---------------------------------|
| Total number of employees at this facility*: Temporary employees | | |
| Less than 5 | 299 | 83.52% |
| 5-9 | 27 | 7.54% |
| 10-19 | 17 | 4.75% |
| 20-49 | 9 | 2.51% |
| 50-99 | 4 | 1.12% |
| Over 100 | 2 | 0.56% |
| Total | 358 | |

Total temporary employees: 1645
 Survey Participants: 795
 Question Respondents: 358
 No Response Count: 437
 Response Rate: 45%

| | Count | Percent of Question Respondents |
|--|-------|---------------------------------|
| Projected number of employees at this facility in one year* | | |
| Less than 5 | 322 | 44.35% |
| 5-9 | 186 | 25.62% |
| 10-19 | 100 | 13.77% |
| 20-49 | 77 | 10.61% |
| 50-99 | 24 | 3.31% |
| Over 100 | 17 | 2.34% |
| Total | 726 | |

Survey Participants: 795
Question Respondents: 726
No Response Count: 69
Response Rate: 91%

| | Count | Percent of Question Respondents |
|---|-------|---------------------------------|
| Projected number of employees at this facility in three years* | | |
| Less than 5 | 306 | 41.46% |
| 5-9 | 186 | 25.20% |
| 10-19 | 114 | 15.45% |
| 20-49 | 84 | 11.38% |
| 50-99 | 28 | 3.79% |
| Over 100 | 20 | 2.71% |
| Total | 738 | |

Survey Participants: 795
Question Respondents: 738
No Response Count: 57
Response Rate: 93%

| | Count | Percent of Question Respondents |
|---|--------------|--|
| How did the number of staff change, if at all, in the last 3 years?: Full time | | |
| Increased | 173 | 26.41% |
| Stayed the same | 394 | 60.15% |
| Decreased | 88 | 13.44% |
| Total | 655 | |

Survey Participants: 795
 Question Respondents: 655
 No Response Count: 140
 Response Rate: 82%

| | Count | Percent of Question Respondents |
|---|--------------|--|
| How did the number of staff change, if at all, in the last 3 years?: Part time | | |
| Increased | 140 | 24.87% |
| Stayed the same | 348 | 61.81% |
| Decreased | 75 | 13.32% |
| Total | 563 | |

Survey Participants: 795
 Question Respondents: 563
 No Response Count: 232
 Response Rate: 71%

| | Count | Percent of Question Respondents |
|--|-------|---------------------------------|
| How did the number of staff change, if at all, in the last 3 years?: Casual | | |
| Increased | 64 | 15.02% |
| Stayed the same | 319 | 74.88% |
| Decreased | 43 | 10.09% |
| Total | 426 | |

Survey Participants: 795
 Question Respondents: 426
 No Response Count: 369
 Response Rate: 54%

| | Count | Percent of Question Respondents |
|---|-------|---------------------------------|
| How do you expect the number of staff to change, if at all over the next 3 years?: Full time | | |
| Increased | 266 | 41.76% |
| Stayed the same | 344 | 54.00% |
| Decreased | 27 | 4.24% |
| Total | 637 | |

Survey Participants: 795
 Question Respondents: 637
 No Response Count: 158
 Response Rate: 80%

| | Count | Percent of Question Respondents |
|---|-------|---------------------------------|
| How do you expect the number of staff to change, if at all over the next 3 years?: Part time | | |
| Increased | 196 | 34.88% |
| Stayed the same | 334 | 59.43% |
| Decreased | 32 | 5.69% |
| Total | 562 | |

Survey Participants: 795
Question Respondents: 562
No Response Count: 233
Response Rate: 71%

| | Count | Percent of Question Respondents |
|--|-------|---------------------------------|
| How do you expect the number of staff to change, if at all over the next 3 years?: Casual | | |
| Increased | 87 | 20.76% |
| Stayed the same | 316 | 75.42% |
| Decreased | 16 | 3.82% |
| Total | 419 | |

Survey Participants: 795
Question Respondents: 419
No Response Count: 376
Response Rate: 53%

| | Count | Percent of Question Respondents |
|--|--------------|--|
| Describe the majority of essential personnel at this location | | |
| Less than 25 | 54 | 8.13% |
| 26 - 34 | 158 | 23.80% |
| 35 - 49 | 313 | 47.14% |
| 50 or older | 139 | 20.93% |
| Total | 664 | |

Survey Participants: 795
 Question Respondents: 664
 No Response Count: 131
 Response Rate: 84%

WAGES

| | Count | Percent of Question Respondents |
|---|-------|---------------------------------|
| Describe the wage scale here compared to all other firms locally | | |
| Lower than | 57 | 10.31% |
| Same as | 295 | 53.35% |
| Greater than | 201 | 36.35% |
| Total | 553 | |

Survey Participants: 795
 Question Respondents: 553
 No Response Count: 242
 Response Rate: 70%

| | Count | Percent of Question Respondents |
|--|-------|---------------------------------|
| Average hourly wage: Skilled/Professional | | |
| Under \$10 | 15 | 3.23% |
| \$10-\$12.99 | 32 | 6.90% |
| \$13-\$14.99 | 20 | 4.31% |
| \$15-\$19.99 | 73 | 15.73% |
| \$20-\$29.99 | 152 | 32.76% |
| \$30-49.99 | 126 | 27.16% |
| \$50-\$99 | 39 | 8.41% |
| \$100 or more | 7 | 1.51% |
| Total | 464 | |

Survey Participants: 795
 Question Respondents: 464
 No Response Count: 331
 Response Rate: 58%

| | Count | Percent of Question Respondents |
|--|-------|---------------------------------|
| Average hourly wage: Semi-skilled | | |
| Under \$10 | 24 | 6.47% |
| \$10-\$12.99 | 77 | 20.75% |
| \$13-\$14.99 | 43 | 11.59% |
| \$15-\$19.99 | 105 | 28.30% |
| \$20-\$29.99 | 104 | 28.03% |
| \$30-49.99 | 17 | 4.58% |
| \$100 or more | 1 | 0.27% |
| Total | 371 | |

Survey Participants: 795
Question Respondents: 371
No Response Count: 424
Response Rate: 47%

| | Count | Percent of Question Respondents |
|---|-------|---------------------------------|
| Average hourly wage: Entry-level | | |
| Under \$10 | 39 | 13.45% |
| \$10-\$12.99 | 146 | 50.34% |
| \$13-\$14.99 | 30 | 10.34% |
| \$15-\$19.99 | 46 | 15.86% |
| \$20-\$29.99 | 26 | 8.97% |
| \$30-49.99 | 3 | 1.03% |
| Total | 290 | |

Survey Participants: 795
Question Respondents: 290
No Response Count: 505
Response Rate: 36%

RECRUITMENT

| | Count | Percent of Question Respondents |
|--|-------|---------------------------------|
| Is the number of unfilled positions | | |
| Stable | 462 | 82.50% |
| Decreasing | 24 | 4.29% |
| Increasing | 74 | 13.21% |
| Total | 560 | |

Survey Participants: 795
 Question Respondents: 560
 No Response Count: 235
 Response Rate: 70%

| | Count | Percent of Question Respondents |
|---|-------|---------------------------------|
| Where does the company attract the majority of its workers from? | | |
| Internationally | 11 | 1.53% |
| Nationally | 32 | 4.46% |
| Provincially | 36 | 5.02% |
| Locally | 638 | 88.98% |
| Total | 717 | |

Survey Participants: 795
 Question Respondents: 717
 No Response Count: 78
 Response Rate: 90%

| | Count | Percent of Question Respondents |
|--|-------|---------------------------------|
| Is the company experiencing recruitment problems with any employee positions or skills? | | |
| Yes | 317 | 45.68% |
| No | 377 | 54.32% |
| Total | 694 | |

Survey Participants: 795
Question Respondents: 694
No Response Count: 101
Response Rate: 87%

| | Count | Percent of Question Respondents |
|---|-------|---------------------------------|
| Is the company experiencing recruitment problems with any employee positions or skills?: If Yes, in which category(s)? | | |
| Assembler/Line Workers | 1 | 0.32% |
| Advanced Mfg Workers | 2 | 0.64% |
| Manufacturing/Other | 4 | 1.28% |
| Agriculture/Farming | 5 | 1.60% |
| Healthcare Professionals | 5 | 1.60% |
| Marketing | 5 | 1.60% |
| CDL Drivers | 6 | 1.92% |
| Plant Managers / Operators | 6 | 1.92% |
| Graphics Arts/Printing | 7 | 2.24% |
| Machinists | 9 | 2.88% |
| Material/Fabricators | 11 | 3.53% |
| Maintenance | 14 | 4.49% |
| Construction/Contractors | 16 | 5.13% |
| Prof/Info Tech/Programming | 16 | 5.13% |
| Electrical/Electronics | 22 | 7.05% |
| Hospitality Service | 24 | 7.69% |
| Machine Operators | 25 | 8.01% |
| Administrative/Clerical | 28 | 8.97% |

| | Count | Percent of Question Respondents |
|---|------------|---------------------------------|
| Is the company experiencing recruitment problems with any employee positions or skills?: If Yes, in which category(s)? | | |
| General Laborer | 29 | 9.29% |
| Mechanics | 30 | 9.62% |
| Food/Beverage Service | 32 | 10.26% |
| Professional/Other | 37 | 11.86% |
| Professional/Technical | 39 | 12.50% |
| Sales/Service | 42 | 13.46% |
| Sales/Retail | 43 | 13.78% |
| None | 2 | 0.64% |
| Other | 190 | 60.90% |
| Total | 650 | |

Survey Participants: 795
Question Respondents: 312
No Response Count: 5
Parent Question 'Yes' Respondents: 317
Parent Question Respondents: 694
Response Rate: 98%

| | Count | Percent of Question Respondents |
|--|-------|---------------------------------|
| Is the company experiencing recruitment problems with any employee positions or skills?: Other (specify job roles/titles) | | |
| Accountants | 1 | 0.32% |
| Actuarials | 1 | 0.32% |
| Audiologists | 1 | 0.32% |
| Bartenders | 1 | 0.32% |
| Cooks | 1 | 0.32% |
| Custodians | 1 | 0.32% |
| Fitness instructors | 1 | 0.32% |
| Funeral director | 1 | 0.32% |
| HVAC | 1 | 0.32% |

| | Count | Percent of Question Respondents |
|--|-------|---------------------------------|
| Is the company experiencing recruitment problems with any employee positions or skills?: Other (specify job roles/titles) | | |
| Insurance brokers | 1 | 0.32% |
| Labourers | 1 | 0.32% |
| Licensed broker | 1 | 0.32% |
| Nutritionist | 1 | 0.32% |
| Realtors | 1 | 0.32% |
| Social service workers | 1 | 0.32% |
| Statisticians | 1 | 0.32% |
| Students | 1 | 0.32% |
| Surveyors | 1 | 0.32% |
| Teachers | 1 | 0.32% |
| Yoga Instructors | 1 | 0.32% |
| Chefs & Bakers | 2 | 0.64% |
| Chemists | 2 | 0.64% |
| Computer-aided design (CAD) technologists | 2 | 0.64% |
| Interior designers | 2 | 0.64% |
| Lawyers | 2 | 0.64% |
| Marketing professionals | 2 | 0.64% |
| Pharmacists | 2 | 0.64% |
| Bookkeepers | 3 | 0.96% |
| Customer service representatives | 3 | 0.96% |
| Good employee | 3 | 0.96% |
| Horticulturists | 3 | 0.96% |
| Sales | 3 | 0.96% |
| System administrators | 3 | 0.96% |
| Commercial drivers | 4 | 1.28% |
| Cosmetologist | 4 | 1.28% |
| Creative Writers | 4 | 1.28% |
| Hair Stylists | 5 | 1.60% |
| Housekeeping | 5 | 1.60% |

| | Count | Percent of Question Respondents |
|--|-------|---------------------------------|
| Is the company experiencing recruitment problems with any employee positions or skills?: Other (specify job roles/titles) | | |
| Machine operators | 6 | 1.92% |
| Web designers | 6 | 1.92% |
| Computer technologists | 7 | 2.24% |
| Engineers | 8 | 2.56% |
| Software developers | 9 | 2.88% |
| Managers | 22 | 7.05% |
| Skilled trades | 29 | 9.29% |
| Total | 161 | |

Survey Participants: 795
Question Respondents: 167
No Response Count: 23
Parent Question 'Other' Respondents: 190
Parent Question Respondents: 312
Response Rate: 88%

| | Count | Percent of Question Respondents |
|--|-------|---------------------------------|
| Do you anticipate future recruiting difficulties i.e. 3-5 year? | | |
| Yes | 350 | 51.55% |
| No | 329 | 48.45% |
| Total | 679 | |

Survey Participants: 795
Question Respondents: 679
No Response Count: 116
Response Rate: 85%

| | Count | Percent of Question Respondents |
|---|--------------|--|
| Do you anticipate future recruiting difficulties i.e. 3-5 year? : If Yes, in what area(s)? | | |
| Advanced Mfg Workers | 1 | 0.31% |
| Assembler/Line Workers | 1 | 0.31% |
| Manufacturing/Other | 3 | 0.92% |
| Agriculture/Farming | 6 | 1.84% |
| CDL Drivers | 6 | 1.84% |
| Plant Managers/Operators | 6 | 1.84% |
| Healthcare Professionals | 7 | 2.15% |
| Marketing | 7 | 2.15% |
| Graphics Arts/Printing | 9 | 2.76% |
| Material/Fabricators | 10 | 3.07% |
| Construction/Contractors | 13 | 3.99% |
| Machinists | 13 | 3.99% |
| Electrical/Electronics | 15 | 4.60% |
| Maintenance | 15 | 4.60% |
| Hospitality Service | 19 | 5.83% |
| Machine Operators | 20 | 6.13% |
| Prof/Info Tech/Programming | 20 | 6.13% |
| Administrative/Clerical | 30 | 9.20% |
| General Laborer | 30 | 9.20% |
| Food/Beverage Service | 32 | 9.82% |
| Professional/Other | 37 | 11.35% |
| Professional/Technical | 38 | 11.66% |
| Sales/Service | 38 | 11.66% |
| Mechanics | 42 | 12.88% |
| Sales/Retail | 42 | 12.88% |
| None | 1 | 0.31% |
| Other | 184 | 56.44% |
| Total | 645 | |

Survey Participants: 795
 Question Respondents: 326
 No Response Count: 24
 Parent Question 'Yes' Respondents: 350
 Parent Question Respondents: 679
 Response Rate: 93%

| | Count | Percent of Question Respondents |
|---|--------------|--|
| Do you anticipate future recruiting difficulties i.e. 3-5 year? : Other (specify job roles/titles) | | |
| Actuarial | 1 | 0.31% |
| Arbourist | 1 | 0.31% |
| Audiologists | 1 | 0.31% |
| Chemists | 1 | 0.31% |
| Cooks | 1 | 0.31% |
| Cosmetologists | 1 | 0.31% |
| Counselors for boys | 1 | 0.31% |
| Custodians | 1 | 0.31% |
| Educators | 1 | 0.31% |
| Executives | 1 | 0.31% |
| Farmers | 1 | 0.31% |
| General Laborer | 1 | 0.31% |
| Healthcare Professionals | 1 | 0.31% |
| Heavy Equipment Operators | 1 | 0.31% |
| Insurance Brokers | 1 | 0.31% |
| Interior designers | 1 | 0.31% |
| Jewelers | 1 | 0.31% |
| Licensed brokers | 1 | 0.31% |
| Realtors | 1 | 0.31% |
| Reporters | 1 | 0.31% |
| River guides | 1 | 0.31% |
| Seed agrologist | 1 | 0.31% |
| Servers | 1 | 0.31% |
| Statisticians | 1 | 0.31% |
| Surveyors | 1 | 0.31% |
| Washers | 1 | 0.31% |
| Yard Technicians | 1 | 0.31% |
| Apprentices | 2 | 0.61% |
| Business Adminstration | 2 | 0.61% |

| | Count | Percent of Question Respondents |
|---|--------------|--|
| Do you anticipate future recruiting difficulties i.e. 3-5 year? : Other (specify job roles/titles) | | |
| Butchers | 2 | 0.61% |
| Cosmetologist | 2 | 0.61% |
| Lawyers | 2 | 0.61% |
| Sales | 2 | 0.61% |
| Skilled professional | 2 | 0.61% |
| Bakers | 3 | 0.92% |
| Bookkeepers | 3 | 0.92% |
| General laborer | 3 | 0.92% |
| Hair stylists | 3 | 0.92% |
| Journalists | 3 | 0.92% |
| Pharmacists | 3 | 0.92% |
| Accountants | 4 | 1.23% |
| Housekeeping | 5 | 1.53% |
| Commercial Truck Drivers | 6 | 1.84% |
| Engineers | 10 | 3.07% |
| Managers | 12 | 3.68% |
| Computer professionals | 19 | 5.83% |
| Skilled trades | 27 | 8.28% |
| Total | 142 | |

| | |
|--------------------------------------|-----|
| Survey Participants: | 795 |
| Question Respondents: | 158 |
| No Response Count: | 26 |
| Parent Question 'Other' Respondents: | 184 |
| Parent Question Respondents: | 326 |
| Response Rate: | 86% |

| | Count | Percent of Question Respondents |
|--|--------------|--|
| If applicable, please describe any recruitment activities or strategies you have undertaken to attract employees. | | |
| Job Fairs | 1 | 0.34% |
| Offer apprenticeships | 1 | 0.34% |
| Paid Referral Program | 1 | 0.34% |
| Selling on lifestyle | 1 | 0.34% |
| Advertising | 2 | 0.68% |
| Online job boards | 2 | 0.68% |
| Flexible work schedule | 3 | 1.02% |
| National advertising | 3 | 1.02% |
| Recruitng Firms | 3 | 1.02% |
| Training opportunities | 3 | 1.02% |
| Internal job postings | 4 | 1.37% |
| Recruiting Firms | 4 | 1.37% |
| Staff discounts | 4 | 1.37% |
| Canada Job Bank | 5 | 1.71% |
| Job fairs | 5 | 1.71% |
| Offer benefits/bonuses | 5 | 1.71% |
| International recruitment | 6 | 2.05% |
| Road side sign | 6 | 2.05% |
| Trade Journals | 6 | 2.05% |
| Employment agencies | 7 | 2.39% |
| WorkBC | 8 | 2.73% |
| Post openings on company website | 9 | 3.07% |
| Online advertising | 14 | 4.78% |
| Social media (Facebook/ LinkedIn) | 14 | 4.78% |
| College recruitment | 19 | 6.48% |
| Online Job boards | 31 | 10.58% |
| Local advertising | 63 | 21.50% |
| Word of mouth | 90 | 30.72% |
| None | 56 | 19.11% |

| | Count | Percent of Question Respondents |
|--|-------|---------------------------------|
| If applicable, please describe any recruitment activities or strategies you have undertaken to attract employees. | | |
| Total | 376 | |

Survey Participants: 609
 Question Respondents: 293
 No Response Count: 316
 Response Rate: 48%

| | Count | Percent of Question Respondents |
|---|-------|---------------------------------|
| Is there anything we can do to help overcome issues with employee recruitment? | | |
| Yes | 57 | 38.00% |
| No | 93 | 62.00% |
| Total | 150 | |

Survey Participants: 795
 Question Respondents: 150
 No Response Count: 645
 Response Rate: 19%

| | Count | Percent of Question Respondents |
|---|-------|---------------------------------|
| Is there anything we can do to help overcome issues with employee recruitment?: If Yes, please explain | | |
| Attract talented people | 1 | 2.50% |
| Improve health care and hospital services | 1 | 2.50% |
| Provide a good connection to universities and summer students | 1 | 2.50% |
| Provide better job preparation | 1 | 2.50% |
| Provide other fulltime employment | 1 | 2.50% |
| Provide relocation assistance | 1 | 2.50% |
| Sponsor job fairs | 1 | 2.50% |
| Provide a better community for families | 2 | 5.00% |

| | Count | Percent of Question Respondents |
|---|--------------|--|
| Is there anything we can do to help overcome issues with employee recruitment?: If Yes, please explain | | |
| Subsidize wages | 2 | 5.00% |
| Bring cost of living down | 3 | 7.50% |
| Support affordable housing | 3 | 7.50% |
| Help with foreign worker program | 4 | 10.00% |
| Provide training support | 7 | 17.50% |
| Establish a job bank | 11 | 27.50% |
| Total | 39 | |

| | |
|------------------------------------|-----|
| Survey Participants: | 795 |
| Question Respondents: | 40 |
| No Response Count: | 17 |
| Parent Question 'Yes' Respondents: | 57 |
| Parent Question Respondents: | 150 |
| Response Rate: | 70% |

RETENTION

| | Count | Percent of Question Respondents |
|---|-------|---------------------------------|
| Is employee retention a problem? | | |
| Yes | 209 | 30.60% |
| No | 474 | 69.40% |
| Total | 683 | |

Survey Participants: 795
 Question Respondents: 683
 No Response Count: 112
 Response Rate: 86%

| | Count | Percent of Question Respondents |
|--|-------|---------------------------------|
| If applicable, please describe any challenges and / or efforts you have undertaken to retain employees. | | |
| Apprentice training | 1 | 0.35% |
| Child Care | 3 | 1.06% |
| Profit sharing | 7 | 2.48% |
| Subsidized housing | 8 | 2.84% |
| Avoid layoffs (find extra work) | 13 | 4.61% |
| Training | 19 | 6.74% |
| Staff discounts | 20 | 7.09% |
| Support personal growth and skill development | 34 | 12.06% |
| Bonuses | 44 | 15.60% |
| Flexible work schedule | 51 | 18.09% |
| Support a positive environment | 57 | 20.21% |
| Benefits | 58 | 20.57% |
| Competitive wages | 68 | 24.11% |
| None | 39 | 13.83% |
| Total | 422 | |

Survey Participants: 609
 Question Respondents: 282
 No Response Count: 327

| | Count | Percent of Question Respondents |
|--|-------|---------------------------------|
| If applicable, please describe any challenges and / or efforts you have undertaken to retain employees. | | |

Response Rate: 46%

SKILLS AND TRAINING

| | Count | Percent of Question Respondents |
|---|-------|---------------------------------|
| Skill Level of Majority of Workforce | | |
| Skilled/Professional | 368 | 55.26% |
| Semi-skilled | 113 | 16.97% |
| Entry-level | 49 | 7.36% |
| Total | 530 | |

Survey Participants: 795
 Question Respondents: 666
 Response Rate: 83.77%

| | Count | Percent of Question Respondents |
|---|-------|---------------------------------|
| Percent of workforce: Skilled/Professional | | |
| less than 25% | 137 | 20.57% |
| 25 to 49% | 93 | 13.96% |
| 50 to 74% | 110 | 16.52% |
| 75 to 100% | 326 | 48.95% |
| Total | 666 | |

Survey Participants: 795
 Question Respondents: 666
 No Response Count: 129
 Response Rate: 84%

| | Count | Percent of Question Respondents |
|---|-------|---------------------------------|
| Percent of workforce: Semi-skilled | | |
| less than 25% | 382 | 57.36% |
| 25 to 49% | 122 | 18.32% |
| 50 to 74% | 95 | 14.26% |
| 75 to 100% | 67 | 10.06% |
| Total | 666 | |

Survey Participants: 795

Question Respondents: 666

No Response Count: 129

Response Rate: 84%

| | Count | Percent of Question Respondents |
|--|-------|---------------------------------|
| Percent of workforce: Entry-level | | |
| less than 25% | 518 | 77.78% |
| 25 to 49% | 65 | 9.76% |
| 50 to 74% | 53 | 7.96% |
| 75 to 100% | 30 | 4.50% |
| Total | 666 | |

Survey Participants: 795

Question Respondents: 666

No Response Count: 129

Response Rate: 84%

| | Count | Percent of Question Respondents |
|--|-------|---------------------------------|
| Does the company provide a training budget in order to upgrade employee's skills? | | |
| Yes | 358 | 53.12% |
| No | 316 | 46.88% |
| Total | 674 | |

Survey Participants: 795
 Question Respondents: 674
 No Response Count: 121
 Response Rate: 85%

| | Count | Percent of Question Respondents |
|--|-------|---------------------------------|
| Does the company offer in-house training? | | |
| Yes | 135 | 84.91% |
| No | 24 | 15.09% |
| Total | 159 | |

Survey Participants: 795
 Question Respondents: 159
 No Response Count: 636
 Response Rate: 20%

| | Count | Percent of Question Respondents |
|--|-------|---------------------------------|
| Does the company use Contracted Training? | | |
| Yes | 61 | 38.85% |
| No | 96 | 61.15% |
| Total | 157 | |

Survey Participants: 795
 Question Respondents: 157
 No Response Count: 638
 Response Rate: 20%

| | Count | Percent of Question Respondents |
|---|-------|---------------------------------|
| Are there any areas of training or professional development that would be of benefit to you or your employees? | | |
| Yes | 494 | 71.80% |
| No | 194 | 28.20% |
| Total | 688 | |

Survey Participants: 795
Question Respondents: 688
No Response Count: 107
Response Rate: 87%

| | Count | Percent of Question Respondents |
|---|-------|---------------------------------|
| Are there any areas of training or professional development that would be of benefit to you or your employees?: If Yes, what are they? | | |
| Barista | 1 | 0.21% |
| Environmental programs | 1 | 0.21% |
| Horticulture | 1 | 0.21% |
| Professional development | 4 | 0.82% |
| Continued education | 6 | 1.23% |
| Cooking skills | 7 | 1.44% |
| Emerging technologies | 19 | 3.91% |
| Managerial training | 24 | 4.94% |
| Social media | 24 | 4.94% |
| Industrial equipment operations | 31 | 6.38% |
| Web site design | 36 | 7.41% |
| Computer skills | 49 | 10.08% |
| Accounting/Bookkeeping | 50 | 10.29% |
| Emerging industry practices | 55 | 11.32% |
| Customer service | 60 | 12.35% |
| Technical training | 61 | 12.55% |
| Business management | 70 | 14.40% |

| | Count | Percent of Question Respondents |
|---|-------|---------------------------------|
| Are there any areas of training or professional development that would be of benefit to you or your employees?: If Yes, what are they? | | |
| Sales/Marketing | 72 | 14.81% |
| Safety/First Aid/Food Safe | 76 | 15.64% |
| Total | 647 | |

| | |
|------------------------------------|-----|
| Survey Participants: | 795 |
| Question Respondents: | 486 |
| No Response Count: | 8 |
| Parent Question 'Yes' Respondents: | 494 |
| Parent Question Respondents: | 688 |
| Response Rate: | 98% |

| | Count | Percent of Question Respondents |
|--|-------|---------------------------------|
| When your staff attend training/certification, where do they usually access the training? | | |
| United States | 72 | 12.10% |
| Rest of Canada | 105 | 17.65% |
| Regional | 158 | 26.55% |
| British Columbia | 223 | 37.48% |
| Local | 309 | 51.93% |
| Total | 867 | |

| | |
|-----------------------|-----|
| Survey Participants: | 795 |
| Question Respondents: | 595 |
| No Response Count: | 200 |
| Response Rate: | 75% |

| | Count | Percent of Question Respondents |
|--|-------|---------------------------------|
| What modes of education/training work best for you? | | |
| Individual coaching | 312 | 48.90% |
| Online/ Webinar training | 332 | 52.04% |
| Classroom | 350 | 54.86% |
| Other | 97 | 15.20% |
| Total | 1091 | |

Survey Participants: 795
 Question Respondents: 638
 No Response Count: 157
 Response Rate: 80%

| | Count | Percent of Question Respondents |
|--|-------|---------------------------------|
| What modes of education/training work best for you?: Other Name | | |
| Mentor | 6 | 0.94% |
| Trade shows / Conferences | 35 | 5.49% |
| In-house / Hands on / Workshop | 56 | 8.78% |
| Total | 97 | |

Survey Participants: 795
 Question Respondents: 97
 No Response Count: 0
 Parent Question 'Other' Respondents: 97
 Parent Question Respondents: 638
 Response Rate: 100%

| | Count | Percent of Question Respondents |
|---|-------|---------------------------------|
| Are you aware of any anticipated trends, technologies, significant changes that will be occurring in your industry that will require new skills? | | |
| Yes | 340 | 51.52% |
| No | 320 | 48.48% |
| Total | 660 | |

Survey Participants: 795
Question Respondents: 660
No Response Count: 135
Response Rate: 83%

| | Count | Percent of Question Respondents |
|---|-------|---------------------------------|
| What new training might you need to consider in the next five years? | | |
| Accounting/Bookeeping | 1 | 1.04% |
| Airbrushing | 1 | 1.04% |
| Automated steel fabrication | 1 | 1.04% |
| Business communications | 1 | 1.04% |
| Civil engineering | 1 | 1.04% |
| Customer service | 1 | 1.04% |
| Data analytics | 1 | 1.04% |
| Government regulations | 1 | 1.04% |
| Hand-held technology | 1 | 1.04% |
| Heavy equipment technologies | 1 | 1.04% |
| Landscape design | 1 | 1.04% |
| Marketing | 1 | 1.04% |
| Online payment systems | 1 | 1.04% |
| Pharmacology | 1 | 1.04% |
| Plant Science | 1 | 1.04% |
| Plumbing | 1 | 1.04% |
| Prepared food training | 1 | 1.04% |

| | Count | Percent of Question Respondents |
|---|--------------|--|
| What new training might you need to consider in the next five years? | | |
| Robotics | 1 | 1.04% |
| Safety | 1 | 1.04% |
| Sales | 1 | 1.04% |
| Social media communications | 1 | 1.04% |
| Specialized health services | 1 | 1.04% |
| Stained glass soldering | 1 | 1.04% |
| Water management. | 1 | 1.04% |
| Bookkeeping | 2 | 2.08% |
| Food Safe | 2 | 2.08% |
| HVAC | 2 | 2.08% |
| Website design | 2 | 2.08% |
| Emerging industry practices | 3 | 3.12% |
| Social Media | 3 | 3.12% |
| Electronics | 4 | 4.17% |
| Social media marketing | 4 | 4.17% |
| Solar technologies | 5 | 5.21% |
| Computer and technology training | 8 | 8.33% |
| Technology Skills | 8 | 8.33% |
| Online marketing | 12 | 12.50% |
| Emerging technologies | 14 | 14.58% |
| Total | 93 | |

Survey Participants: 795
 Question Respondents: 96
 No Response Count: 699
 Response Rate: 12%

UNIONS

| | Count | Percent of Question Respondents |
|-----------------------|-------|---------------------------------|
| Union status | | |
| Yes | 40 | 5.95% |
| No | 504 | 75.00% |
| Not applicable | 128 | 19.05% |
| Total | 672 | |

Survey Participants: 795

Question Respondents: 672

No Response Count: 123

Response Rate: 85%

EMPLOYEES

| | Count | Percent of Question Respondents |
|---|-------|---------------------------------|
| In general terms, what percent of your workforce lives in the: Community (%) | | |
| 0-24% | 12 | 2.48% |
| 25-49% | 9 | 1.86% |
| 50-74% | 39 | 8.06% |
| 75-100% | 424 | 87.60% |
| Total | 484 | |

Survey Participants: 609

Question Respondents: 484

No Response Count: 125

Response Rate: 79%

| | Count | Percent of Question Respondents |
|---|-------|---------------------------------|
| In general terms, what percent of your workforce lives in the: Region (%) - includes entire Columbia Basin-Boundary region | | |
| 0-24% | 44 | 41.90% |
| 25-49% | 24 | 22.86% |
| 50-74% | 24 | 22.86% |
| 75-100% | 13 | 12.38% |
| Total | 105 | |

Survey Participants: 609
Question Respondents: 105
No Response Count: 504
Response Rate: 17%

| | Count | Percent of Question Respondents |
|---|-------|---------------------------------|
| In general terms, what percent of your workforce lives in the: Outside of region (%) | | |
| 0-24% | 22 | 52.38% |
| 25-49% | 9 | 21.43% |
| 50-74% | 4 | 9.52% |
| 75-100% | 7 | 16.67% |
| Total | 42 | |

Survey Participants: 609
Question Respondents: 42
No Response Count: 567
Response Rate: 7%

| | Count | Percent of Question Respondents |
|---|------------|---------------------------------|
| Please indicate which issues you believe are critical to your employees? | | |
| Transportation | 118 | 26.28% |
| Child care | 155 | 34.52% |
| Housing | 230 | 51.22% |
| Cost of living | 319 | 71.05% |
| Other | 169 | 37.64% |
| Total | 991 | |

Survey Participants: 609
Question Respondents: 449
No Response Count: 160
Response Rate: 74%

| | Count | Percent of Question Respondents |
|--|-------|---------------------------------|
| Please indicate which issues you believe are critical to your employees?: If <i>Other</i>, please list any other issues | | |
| Proximity to airport | 1 | 0.22% |
| Seasonality of work | 1 | 0.22% |
| Cost of living | 2 | 0.45% |
| Cell phone service | 3 | 0.67% |
| Job security | 3 | 0.67% |
| Benefits | 4 | 0.89% |
| Recreation amenities | 4 | 0.89% |
| Training | 4 | 0.89% |
| Child care | 5 | 1.11% |
| Healthcare | 5 | 1.11% |
| Healthy Work environment | 5 | 1.11% |
| Seasonality of the work offered | 5 | 1.11% |
| Double income opportunities | 7 | 1.56% |
| Public transit | 7 | 1.56% |
| Broadband service | 8 | 1.78% |

| | Count | Percent of Question Respondents |
|--|-------|---------------------------------|
| Please indicate which issues you believe are critical to your employees?: If <i>Other</i>, please list any other issues | | |
| Flextime | 8 | 1.78% |
| Work environment | 10 | 2.23% |
| Getting enough work hours | 13 | 2.90% |
| Wages | 19 | 4.23% |
| Affordable housing | 24 | 5.35% |
| Lifestyle | 31 | 6.90% |
| Total | 169 | |

| | |
|--------------------------------------|------|
| Survey Participants: | 609 |
| Question Respondents: | 170 |
| No Response Count: | 0 |
| Parent Question 'Other' Respondents: | 169 |
| Parent Question Respondents: | 449 |
| Response Rate: | 100% |

SALES

MARKET SIZE AND SHARE

| | Count | Percent of Question Respondents |
|---|-------|---------------------------------|
| Annual sales at this facility (optional) | | |
| Under \$25,000 | 28 | 6.10% |
| \$49,999 to \$25,000 | 34 | 7.41% |
| \$99,999 to \$50,000 | 36 | 7.84% |
| 499,999 to \$100,000 | 147 | 32.03% |
| \$999,999 to \$500,000 | 67 | 14.60% |
| \$4.9 million to 1 million | 101 | 22.00% |
| \$9.9 million to 5 million | 19 | 4.14% |
| \$19.9 million to 10 million | 10 | 2.18% |
| \$50 million to 20 million | 11 | 2.40% |
| over \$50 million | 6 | 1.31% |
| Total | 459 | |

Survey Participants: 795
 Question Respondents: 459
 No Response Count: 336
 Response Rate: 58%

| | Count | Percent of Question Respondents |
|---------------------------------------|-------|---------------------------------|
| Is the market for your product | | |
| Stable | 286 | 37.19% |
| Decreasing | 73 | 9.49% |
| Increasing | 410 | 53.32% |
| Total | 769 | |

Survey Participants: 795
 Question Respondents: 769
 No Response Count: 26
 Response Rate: 97%

| | Count | Percent of Question Respondents |
|-----------------------------------|-------|---------------------------------|
| International trade status | | |
| Export | 73 | 11.44% |
| Import | 77 | 12.07% |
| None | 92 | 14.42% |
| Not applicable | 425 | 66.61% |
| Total | 667 | |

Survey Participants: 795

Question Respondents: 638

No Response Count: 157

Response Rate: 80
%

| | Count | Percent of Question Respondents |
|--|-------|---------------------------------|
| Is the market share (compared to your competitors) of your company's products | | |
| Stable | 262 | 42.67% |
| Decreasing | 41 | 6.68% |
| Increasing | 311 | 50.65% |
| Total | 614 | |

Survey Participants: 795

Question Respondents: 614

No Response Count: 181

Response Rate: 77%

GROWTH

| | Count | Percent of Question Respondents |
|--|-------|---------------------------------|
| What is the projected sales growth in the next year at this business? | | |
| Declining | 21 | 3.03% |
| 0% | 89 | 12.84% |
| 1 - 9% | 249 | 35.93% |
| 10 - 24% | 199 | 28.72% |
| 25 - 49% | 66 | 9.52% |
| 50 - 99% | 42 | 6.06% |
| Over 100% | 27 | 3.90% |
| Total | 693 | |

Survey Participants: 795
 Question Respondents: 693
 No Response Count: 102
 Response Rate: 87%

| | Count | Percent of Question Respondents |
|---|-------|---------------------------------|
| Historical sales trend: At this business (past five years) | | |
| Declining | 92 | 12.87% |
| Staying the same | 131 | 18.32% |
| Increasing | 462 | 64.62% |
| Not applicable | 30 | 4.20% |
| Total | 715 | |

Survey Participants: 795
 Question Respondents: 715
 No Response Count: 80
 Response Rate: 90%

| | Count | Percent of Question Respondents |
|--|-------|---------------------------------|
| Historical sales trend: At the parent company | | |
| Declining | 15 | 2.68% |
| Staying the same | 35 | 6.26% |
| Increasing | 106 | 18.96% |
| Not applicable | 403 | 72.09% |
| Total | 559 | |

Survey Participants: 795
Question Respondents: 559
No Response Count: 236
Response Rate: 70%

| | Count | Percent of Question Respondents |
|--|-------|---------------------------------|
| Historical sales trend: Within the industry | | |
| Declining | 106 | 16.67% |
| Staying the same | 154 | 24.21% |
| Increasing | 304 | 47.80% |
| Not applicable | 72 | 11.32% |
| Total | 636 | |

Survey Participants: 795
Question Respondents: 636
No Response Count: 159
Response Rate: 80%

| | Count | Percent of Question Respondents |
|--------------------------------------|-------|---------------------------------|
| Historical export sales trend | | |
| Declining | 22 | 3.98% |
| Staying the same | 24 | 4.34% |
| Increasing | 64 | 11.57% |
| Not applicable | 443 | 80.11% |
| Total | 553 | |

Survey Participants: 795
Question Respondents: 553
No Response Count: 242
Response Rate: 70%

SOURCE OF SALES

| | Count | Percent of Question Respondents |
|------------------------------------|-------|---------------------------------|
| Source of Majority of Sales | | |
| Local | 505 | 69.08% |
| Provincial | 43 | 5.88% |
| National | 42 | 5.75% |
| United States | 13 | 1.78% |
| International | 13 | 1.78% |
| Total | 616 | |

Survey Participants: 795
 Question Respondents: 731
 Response Rate: 91.95%
 %

| | Count | Percent of Question Respondents |
|---|-------|---------------------------------|
| Please identify the source of your sales by percentage: Local / Regional | | |
| 0% | 62 | 8.48% |
| 1-9% | 31 | 4.24% |
| 10-19% | 43 | 5.88% |
| 20-29% | 30 | 4.10% |
| 30-39% | 19 | 2.60% |
| 40-49% | 11 | 1.50% |
| 50-59% | 30 | 4.10% |
| 60-69% | 35 | 4.79% |
| 70-79% | 44 | 6.02% |
| 80-89% | 50 | 6.84% |
| 90-99% | 92 | 12.59% |
| 100% | 284 | 38.85% |
| Total | 731 | |

Survey Participants: 795
 Question Respondents: 731
 No Response Count: 64
 Response Rate: 92%

| | Count | Percent of Question Respondents |
|--|------------|---------------------------------|
| Please identify the source of your sales by percentage: | | |
| Provincial | | |
| 0% | 365 | 49.93% |
| 1-9% | 80 | 10.94% |
| 10-19% | 96 | 13.13% |
| 20-29% | 74 | 10.12% |
| 30-39% | 34 | 4.65% |
| 40-49% | 22 | 3.01% |
| 50-59% | 17 | 2.33% |
| 60-69% | 5 | 0.68% |
| 70-79% | 13 | 1.78% |
| 80-89% | 12 | 1.64% |
| 90-99% | 8 | 1.09% |
| 100% | 5 | 0.68% |
| Total | 731 | |

Survey Participants: 795
 Question Respondents: 731
 No Response Count: 64
 Response Rate: 92%

| | Count | Percent of Question Respondents |
|--|-------|---------------------------------|
| Please identify the source of your sales by percentage: | | |
| National | | |
| 0% | 448 | 61.29% |
| 1-9% | 61 | 8.34% |
| 10-19% | 80 | 10.94% |
| 20-29% | 40 | 5.47% |
| 30-39% | 22 | 3.01% |
| 40-49% | 17 | 2.33% |
| 50-59% | 27 | 3.69% |

| | Count | Percent of Question Respondents |
|--|-------|---------------------------------|
| Please identify the source of your sales by percentage: | | |
| National | | |
| 60-69% | 12 | 1.64% |
| 70-79% | 8 | 1.09% |
| 80-89% | 7 | 0.96% |
| 90-99% | 4 | 0.55% |
| 100% | 5 | 0.68% |
| Total | 731 | |

Survey Participants: 795
Question Respondents: 731
No Response Count: 64
Response Rate: 92%

| | Count | Percent of Question Respondents |
|--|-------|---------------------------------|
| Please identify the source of your sales by percentage: | | |
| United States | | |
| 0% | 559 | 76.47% |
| 1-9% | 70 | 9.58% |
| 10-19% | 47 | 6.43% |
| 20-29% | 22 | 3.01% |
| 30-39% | 12 | 1.64% |
| 40-49% | 3 | 0.41% |
| 50-59% | 5 | 0.68% |
| 60-69% | 1 | 0.14% |
| 70-79% | 6 | 0.82% |
| 80-89% | 3 | 0.41% |
| 90-99% | 3 | 0.41% |
| Total | 731 | |

Survey Participants: 795
Question Respondents: 731
No Response Count: 64
Response Rate: 92%

| | Count | Percent of Question Respondents |
|--|-------|---------------------------------|
| Please identify the source of your sales by percentage: | | |
| International | | |
| 0% | 569 | 77.84% |
| 1-9% | 66 | 9.03% |
| 10-19% | 41 | 5.61% |
| 20-29% | 20 | 2.74% |
| 30-39% | 8 | 1.09% |
| 40-49% | 6 | 0.82% |
| 50-59% | 8 | 1.09% |
| 60-69% | 4 | 0.55% |
| 70-79% | 3 | 0.41% |
| 80-89% | 1 | 0.14% |
| 90-99% | 5 | 0.68% |
| Total | 731 | |

Survey Participants: 795
Question Respondents: 731
No Response Count: 64
Response Rate: 92%

| | Count | Percent of Question Respondents |
|--|-------|---------------------------------|
| Percent of total sales generated by top 3 customers | | |
| 1 - 9% | 12 | 26.67% |
| 10 - 25% | 6 | 13.33% |
| 26 - 50% | 4 | 8.89% |
| 51 - 75% | 4 | 8.89% |
| 76 - 100% | 19 | 42.22% |
| Total | 45 | |

Survey Participants: 609
Question Respondents: 45
No Response Count: 564
Response Rate: 7%

| | Count | Percent of Question Respondents |
|---|-------|---------------------------------|
| Do you supply your products or services to any company in the community or region? | | |
| Yes | 110 | 72.85% |
| No | 41 | 27.15% |
| Total | 151 | |

Survey Participants: 795
Question Respondents: 151
No Response Count: 644
Response Rate: 19%

SOURCE OF SUPPLIES

| | Count | Percent of Question Respondents |
|---------------------------------------|-------|---------------------------------|
| Source of Majority of Supplies | | |
| Local | 206 | 29.18% |
| Provincial | 162 | 22.95% |
| National | 113 | 16.01% |
| United States | 38 | 5.38% |
| International | 31 | 4.39% |
| Total | 550 | |

Survey Participants: 795
Question Respondents: 706
Response Rate: 88.81 %

| | Count | Percent of Question Respondents |
|--|------------|---------------------------------|
| Please identify the source of your supplies by percentage: Local / Regional | | |
| 0% | 225 | 31.87% |
| 1-9% | 56 | 7.93% |
| 10-19% | 65 | 9.21% |
| 20-29% | 56 | 7.93% |
| 30-39% | 26 | 3.68% |
| 40-49% | 20 | 2.83% |
| 50-59% | 52 | 7.37% |
| 60-69% | 19 | 2.69% |
| 70-79% | 25 | 3.54% |
| 80-89% | 29 | 4.11% |
| 90-99% | 41 | 5.81% |
| 100% | 92 | 13.03% |
| Total | 706 | |

Survey Participants: 795
Question Respondents: 706
No Response Count: 89
Response Rate: 89%

| | Count | Percent of Question Respondents |
|--|-------|---------------------------------|
| Please identify the source of your supplies by percentage: Provincial | | |
| 0% | 303 | 42.92% |
| 1-9% | 23 | 3.26% |
| 10-19% | 57 | 8.07% |
| 20-29% | 60 | 8.50% |
| 30-39% | 32 | 4.53% |
| 40-49% | 22 | 3.12% |
| 50-59% | 49 | 6.94% |
| 60-69% | 19 | 2.69% |

| | Count | Percent of Question Respondents |
|---|-------|---------------------------------|
| Please identify the source of your supplies by percentage: | | |
| Provincial | | |
| 70-79% | 33 | 4.67% |
| 80-89% | 34 | 4.82% |
| 90-99% | 36 | 5.10% |
| 100% | 38 | 5.38% |
| Total | 706 | |

Survey Participants: 795
Question Respondents: 706
No Response Count: 89
Response Rate: 89%

| | Count | Percent of Question Respondents |
|---|-------|---------------------------------|
| Please identify the source of your supplies by percentage: | | |
| National | | |
| 0% | 349 | 49.43% |
| 1-9% | 33 | 4.67% |
| 10-19% | 54 | 7.65% |
| 20-29% | 62 | 8.78% |
| 30-39% | 27 | 3.82% |
| 40-49% | 25 | 3.54% |
| 50-59% | 47 | 6.66% |
| 60-69% | 16 | 2.27% |
| 70-79% | 21 | 2.97% |
| 80-89% | 19 | 2.69% |
| 90-99% | 22 | 3.12% |
| 100% | 31 | 4.39% |
| Total | 706 | |

Survey Participants: 795
Question Respondents: 706
No Response Count: 89
Response Rate: 89%

| | Count | Percent of Question Respondents |
|---|------------|---------------------------------|
| Please identify the source of your supplies by percentage: United States | | |
| 0% | 502 | 71.10% |
| 1-9% | 33 | 4.67% |
| 10-19% | 55 | 7.79% |
| 20-29% | 33 | 4.67% |
| 30-39% | 15 | 2.12% |
| 40-49% | 8 | 1.13% |
| 50-59% | 22 | 3.12% |
| 60-69% | 3 | 0.42% |
| 70-79% | 8 | 1.13% |
| 80-89% | 11 | 1.56% |
| 90-99% | 7 | 0.99% |
| 100% | 9 | 1.27% |
| Total | 706 | |

Survey Participants: 795
Question Respondents: 706
No Response Count: 89
Response Rate: 89%

| | Count | Percent of Question Respondents |
|---|-------|---------------------------------|
| Please identify the source of your supplies by percentage: International | | |
| 0% | 603 | 85.41% |
| 1-9% | 29 | 4.11% |
| 10-19% | 11 | 1.56% |
| 20-29% | 14 | 1.98% |
| 30-39% | 5 | 0.71% |
| 40-49% | 2 | 0.28% |
| 50-59% | 12 | 1.70% |

| | Count | Percent of Question Respondents |
|---|-------|---------------------------------|
| Please identify the source of your supplies by percentage: International | | |
| 60-69% | 2 | 0.28% |
| 70-79% | 7 | 0.99% |
| 80-89% | 7 | 0.99% |
| 90-99% | 5 | 0.71% |
| 100% | 9 | 1.27% |
| Total | 706 | |

Survey Participants: 795
Question Respondents: 706
No Response Count: 89
Response Rate: 89%

PROCUREMENT

| | Count | Percent of Question Respondents |
|---|-------|---------------------------------|
| Do you engage in government procurement? | | |
| Yes | 70 | 29.54% |
| No | 167 | 70.46% |
| Total | 237 | |

Survey Participants: 609
Question Respondents: 237
No Response Count: 372
Response Rate: 39%

PURCHASING

| | Count | Percent of Question Respondents |
|---|-------|---------------------------------|
| What products or services, if any, are you purchasing from outside the area for which you would like to have a local supplier? | | |
| Beeswax | 1 | 0.45% |
| Chemicals (Methanol ...) | 1 | 0.45% |
| Childrens Toys | 1 | 0.45% |
| Equipment operators | 1 | 0.45% |
| Fiber optic services | 1 | 0.45% |
| Graphite | 1 | 0.45% |
| House hold items | 1 | 0.45% |
| Medical supplies | 1 | 0.45% |
| Micro-hydro equipment | 1 | 0.45% |
| Recreational equipment | 1 | 0.45% |
| Restaurant equipment servicing | 1 | 0.45% |
| Safety equipment | 1 | 0.45% |
| Soap making materials | 1 | 0.45% |
| Spices | 1 | 0.45% |
| Steel | 1 | 0.45% |
| Survey equipment and supplies | 1 | 0.45% |
| Tools | 1 | 0.45% |
| Tour services | 1 | 0.45% |
| Water | 1 | 0.45% |
| Wood products | 1 | 0.45% |
| Artisan products | 2 | 0.90% |
| Metal working services | 2 | 0.90% |
| Office furniture | 2 | 0.90% |
| Woodworking services | 2 | 0.90% |
| Arts and crafts | 3 | 1.35% |
| Hair supplies | 3 | 1.35% |
| Printing services | 3 | 1.35% |
| Wholesale services | 3 | 1.35% |

| | Count | Percent of Question Respondents |
|---|------------|---------------------------------|
| What products or services, if any, are you purchasing from outside the area for which you would like to have a local supplier? | | |
| Packaging services | 4 | 1.80% |
| Electronics | 5 | 2.25% |
| Web hosting | 5 | 2.25% |
| Gardening supplies and equipment | 6 | 2.70% |
| Automotive parts & equipment | 7 | 3.15% |
| Bedding / Linens | 7 | 3.15% |
| Construction materials | 8 | 3.60% |
| Office supplies | 12 | 5.41% |
| Meats & Dairy / Fruits and Vegetables / Grains | 16 | 7.21% |
| Computers / Software | 25 | 11.26% |
| Total | 135 | |

Survey Participants: 609

Question Respondents: 222

No Response Count: 387

Response Rate: 36%

| | Count | Percent of Question Respondents |
|--|-------|---------------------------------|
| If majority of products/services are being purchased from outside of the area, why are they NOT being purchased from within the area? | | |
| Loyalty to current supplier | 11 | 2.83% |
| Long term contract with outside supplier | 16 | 4.11% |
| No control | 16 | 4.11% |
| Unaware of local vendors | 16 | 4.11% |
| head office decision | 16 | 4.11% |
| No applicable to this business | 21 | 5.40% |
| Quality of available products | 43 | 11.05% |
| Higher costs locally | 117 | 30.08% |
| Product not available here | 327 | 84.06% |

| | Count | Percent of Question Respondents |
|--|-------|---------------------------------|
| If majority of products/services are being purchased from outside of the area, why are they NOT being purchased from within the area? | | |
| Other | 31 | 7.97% |
| Total | 614 | |

Survey Participants: 609
Question Respondents: 389
No Response Count: 220
Response Rate: 64%

PURCHASING

| | Count | Percent of Question Respondents |
|--|-------|---------------------------------|
| If majority of products/services are being purchased from outside of the area, why are they NOT being purchased from within the area?: If <i>Other</i>, specify | | |
| Are willing to pay more if local | 1 | 0.26% |
| Bottling supplies | 1 | 0.26% |
| Bulk purchase not available here | 1 | 0.26% |
| Not available locally | 1 | 0.26% |
| Poor customer service | 1 | 0.26% |
| Product is too specialized | 1 | 0.26% |
| Products are manufactured outside of area | 1 | 0.26% |
| Seattle Best decision | 1 | 0.26% |
| Supplied by HQ | 1 | 0.26% |
| Supplies are centrally located in large centers ie Vancouver | 1 | 0.26% |
| Supply | 1 | 0.26% |
| The local suppliers often do not have enough product or do not meet the strict guidelines required to sell their products within our stores. | 1 | 0.26% |
| Very specialised casting and foundry products | 1 | 0.26% |
| artisan listings (see company notes) | 1 | 0.26% |
| availability of fresh produce is seasonal. | 1 | 0.26% |
| because of franchise some of the supplies are on long term contracts | 1 | 0.26% |
| corporate directions | 1 | 0.26% |
| economy of scale: not enough demand to warrant setting up. | 1 | 0.26% |
| for the convience store side of our business where possible we purchase locally ie: bakery goods. | 1 | 0.26% |
| has hired someone to source local herbs | 1 | 0.26% |
| less expensive in USA | 1 | 0.26% |
| name brand knowledge required of bigger brands | 1 | 0.26% |
| no wholesalers specific to electronics in the area | 1 | 0.26% |
| people source local manufactures at store and then go to the local manufacture | 1 | 0.26% |

| | Count | Percent of Question Respondents |
|--|-------|---------------------------------|
| If majority of products/services are being purchased from outside of the area, why are they NOT being purchased from within the area?: If <i>Other</i>, specify | | |
| regulations | 1 | 0.26% |
| restricted by franchise | 1 | 0.26% |
| these are for a small amount of suppliers | 1 | 0.26% |
| would purchase more locally if available and cost effective | 1 | 0.26% |
| Total | 28 | |

| | |
|--------------------------------------|-----|
| Survey Participants: | 609 |
| Question Respondents: | 28 |
| No Response Count: | 3 |
| Parent Question 'Other' Respondents: | 31 |
| Parent Question Respondents: | 389 |
| Response Rate: | 90% |

FACILITIES AND EQUIPMENT

SIZE AND CONDITION

| | Count | Percent of Question Respondents |
|--|-------|---------------------------------|
| What is the square footage of your current facility?: sq/ft | | |
| less than 1,000 sq ft | 172 | 27.79% |
| 1,000-4,999 sq ft | 265 | 42.81% |
| 5,000-9,999 sq ft | 80 | 12.92% |
| 10,000-19,999 sq ft | 44 | 7.11% |
| 20,000 sq ft or more | 58 | 9.37% |
| Total | 619 | |

Survey Participants: 795

Question Respondents: 619

No Response Count: 176

Response Rate: 78%

| | Count | Percent of Question Respondents |
|------------------------------|-------|---------------------------------|
| Condition of facility | | |
| Excellent | 213 | 31.23% |
| Good | 327 | 47.95% |
| Fair | 122 | 17.89% |
| Poor | 20 | 2.93% |
| Total | 682 | |

Survey Participants: 795

Question Respondents: 682

No Response Count: 113

Response Rate: 86%

| | Count | Percent of Question Respondents |
|-------------------------------|-------|---------------------------------|
| Condition of equipment | | |
| Excellent | 238 | 34.95% |
| Good | 360 | 52.86% |
| Fair | 74 | 10.87% |
| Poor | 9 | 1.32% |
| Total | 681 | |

Survey Participants: 795

Question Respondents: 681

No Response Count: 114

Response Rate: 86%

OWNERSHIP

| | Count | Percent of Question Respondents |
|---------------------------|-------|---------------------------------|
| Status of facility | | |
| Leased | 290 | 39.30% |
| Owned | 448 | 60.70% |
| Total | 738 | |

Survey Participants: 795

Question Respondents: 738

No Response Count: 57

Response Rate: 93%

| | Count | Percent of Question Respondents |
|---|-------|---------------------------------|
| Status of facility: If <i>Leased</i>, what is the length of term remaining | | |
| <1 Year | 101 | 44.30% |
| 1 - 2 Years | 43 | 18.86% |
| 3 - 5 Years | 50 | 21.93% |
| > 5 Years | 33 | 14.47% |
| Total | 227 | |

Survey Participants: 795
 Question Respondents: 228
 No Response Count: 62
 Parent Question 'Leased' Respondents: 290
 Parent Question Respondents: 738
 Response Rate: 79%

| | Count | Percent of Question Respondents |
|--|-------|---------------------------------|
| Are you planning on renewing current lease? | | |
| Yes | 251 | 82.84% |
| No | 52 | 17.16% |
| Total | 303 | |

Survey Participants: 795
 Question Respondents: 303
 No Response Count: 492
 Response Rate: 38%

| | Count | Percent of Question Respondents |
|--|-------|---------------------------------|
| Are you planning on renewing current lease?: If No, why not | | |
| Building condition | 1 | 2.27% |
| Business for sale | 1 | 2.27% |
| Buyout possible | 1 | 2.27% |
| Change in business focus | 1 | 2.27% |
| Considering alternatives | 1 | 2.27% |
| Declining business | 1 | 2.27% |
| Facility has been sold | 1 | 2.27% |
| Landlord issues | 1 | 2.27% |
| Poor maintenance | 1 | 2.27% |
| Retiring | 1 | 2.27% |
| Sold business | 1 | 2.27% |
| Building a facility | 3 | 6.82% |
| Business expanding | 3 | 6.82% |
| Not sure | 3 | 6.82% |
| Moving to new location | 5 | 11.36% |
| Seeking larger building | 5 | 11.36% |
| Purchasing a facility | 9 | 20.45% |
| Total | 39 | |

Survey Participants: 795
 Question Respondents: 44
 No Response Count: 8
 Parent Question 'No' Respondents: 52
 Parent Question Respondents: 303
 Response Rate: 85%

| | Count | Percent of Question Respondents |
|--|-------|---------------------------------|
| Do you have a preference of lease vs own? | | |
| Lease | 31 | 23.85% |
| Own | 99 | 76.15% |
| Total | 130 | |

Survey Participants: 795
 Question Respondents: 130
 No Response Count: 665
 Response Rate: 16%

EXPANSION

| | Count | Percent of Question Respondents |
|---|-------|---------------------------------|
| Historical investment trends: Over past 18 months in the <i>facility</i> | | |
| Declining | 49 | 8.17% |
| Staying the same | 299 | 49.83% |
| Increasing | 252 | 42.00% |
| Total | 600 | |

Survey Participants: 795
 Question Respondents: 600
 No Response Count: 195
 Response Rate: 75%

| | Count | Percent of Question Respondents |
|--|-------|---------------------------------|
| Is there room for expansion at this site? | | |
| Yes | 358 | 54.41% |
| No | 242 | 36.78% |
| Maybe | 58 | 8.81% |
| Total | 658 | |

Survey Participants: 795
 Question Respondents: 658
 No Response Count: 137
 Response Rate: 83%

| | Count | Percent of Question Respondents |
|---|-------|---------------------------------|
| Does the company plan to expand in the next three years? | | |
| Yes | 361 | 48.78% |
| No | 379 | 51.22% |
| Total | 740 | |

Survey Participants: 795
 Question Respondents: 740
 No Response Count: 55
 Response Rate: 93%

| | Count | Percent of Question Respondents |
|--|-------|---------------------------------|
| Does the company plan to expand in the next three years?: Will it be in this community? | | |
| Yes | 304 | 86.12% |
| No | 32 | 9.07% |
| Total | 336 | |

Survey Participants: 795
 Question Respondents: 353
 No Response Count: 8
 Parent Question 'Yes' Respondents: 361
 Parent Question Respondents: 740
 Response Rate: 98%

| | Count | Percent of Question Respondents |
|--|-------|---------------------------------|
| Does the company plan to expand in the next three years?: Is your current site adequate for the proposed expansion? | | |
| Yes | 227 | 65.61% |
| No | 111 | 32.08% |
| Total | 338 | |

Survey Participants: 795
Question Respondents: 346
No Response Count: 15
Parent Question 'Yes' Respondents: 361
Parent Question Respondents: 740
Response Rate: 96%

| | Count | Percent of Question Respondents |
|---|-------|---------------------------------|
| Does the company plan to expand in the next three years?: Estimated total investment | | |
| Less than \$25,000 | 49 | 26.20% |
| \$25,000-\$99,999 | 37 | 19.79% |
| \$100,000-\$499,999 | 45 | 24.06% |
| \$500,000-\$999,999 | 14 | 7.49% |
| \$1-\$4.9 million | 27 | 14.44% |
| \$5-\$9.9 million | 2 | 1.07% |
| \$10-19.9 million | 3 | 1.60% |
| \$20 million and over | 10 | 5.35% |
| Total | 187 | |

Survey Participants: 795
Question Respondents: 187
No Response Count: 174
Parent Question 'Yes' Respondents: 361
Parent Question Respondents: 740
Response Rate: 52%

| | Count | Percent of Question Respondents |
|--|-------|---------------------------------|
| Does the company plan to expand in the next three years?: Approximate percentage equipment/technology | | |
| 0% | 5 | 2.94% |
| Under 50% | 47 | 27.65% |
| 50 to 99% | 52 | 30.59% |
| 100% | 66 | 38.82% |
| Total | 170 | |

Survey Participants: 795
Question Respondents: 170
No Response Count: 191
Parent Question 'Yes' Respondents: 361
Parent Question Respondents: 740
Response Rate: 47%

| | Count | Percent of Question Respondents |
|---|-------|---------------------------------|
| Does the company plan to expand in the next three years?: Approximate percentage real estate | | |
| 0% | 26 | 19.12% |
| Under 50% | 25 | 18.38% |
| 50 to 99% | 61 | 44.85% |
| 100% | 24 | 17.65% |
| Total | 136 | |

Survey Participants: 795
Question Respondents: 136
No Response Count: 225
Parent Question 'Yes' Respondents: 361
Parent Question Respondents: 740
Response Rate: 38%

| | Count | Percent of Question Respondents |
|---|------------|---------------------------------|
| Does the company plan to expand in the next three years?: Estimated facility size increase (sq/ft) | | |
| Less than 1,000 sq ft | 56 | 41.48% |
| 1,000 to 4,999 sq ft | 53 | 39.26% |
| 5,000-9,999 sq ft | 14 | 10.37% |
| 10,000-19,999 sq ft | 4 | 2.96% |
| 20,000 sq ft or more | 8 | 5.93% |
| Total | 135 | |

Survey Participants: 795
Question Respondents: 135
No Response Count: 226
Parent Question 'Yes' Respondents: 361
Parent Question Respondents: 740
Response Rate: 37%

| | Count | Percent of Question Respondents |
|--|------------|---------------------------------|
| Does the company plan to expand in the next three years?: Estimated timeframe for expansion | | |
| < 1 Year | 72 | 24.00% |
| 1-3 Years | 176 | 58.67% |
| > 3 Years | 47 | 15.67% |
| Total | 295 | |

Survey Participants: 795
Question Respondents: 300
No Response Count: 61
Parent Question 'Yes' Respondents: 361
Parent Question Respondents: 740
Response Rate: 83%

| | Count | Percent of Question Respondents |
|--|------------|---------------------------------|
| What, if any, are the major constraints on your expansion? (Please check all that are applicable) | | |
| Warehousing | 18 | 4.64% |
| Roads | 19 | 4.90% |
| Energy reliability | 23 | 5.93% |
| Problems with DAs | 31 | 7.99% |
| Energy costs | 32 | 8.25% |
| Transport/freight | 33 | 8.51% |
| Broadband access | 53 | 13.66% |
| Local regulations e.g. zoning | 66 | 17.01% |
| Identifying and accessing new markets | 70 | 18.04% |
| Lack of suitable premises | 75 | 19.33% |
| Other (please specify): | 86 | 22.16% |
| Lack of skilled staff | 94 | 24.23% |
| Finance | 137 | 35.31% |
| Total | 737 | |

| | |
|------------------------------------|------|
| Survey Participants: | 795 |
| Question Respondents: | 388 |
| No Response Count: | 0 |
| Parent Question 'Yes' Respondents: | 361 |
| Parent Question Respondents: | 740 |
| Response Rate: | 100% |

| | Count | Percent of Question Respondents |
|--|------------|---------------------------------|
| What, if any, are the major constraints on your expansion? (Please check all that are applicable): Other (please specify) | | |
| Effective and affordable advertising | 1 | 0.86% |
| Energy Costs | 1 | 0.86% |
| Energy reliability | 1 | 0.86% |
| Finding more projects | 1 | 0.86% |
| Identifying / Accessing New Markets | 1 | 0.86% |
| Local bylaws | 1 | 0.86% |
| Skilled Labour supply | 1 | 0.86% |
| Government | 2 | 1.72% |
| Infrastructure | 2 | 1.72% |
| Lack of business facilities | 2 | 1.72% |
| Location | 2 | 1.72% |
| Resistance to change | 2 | 1.72% |
| Transportation / Freight | 2 | 1.72% |
| Community support | 3 | 2.59% |
| Management approval | 3 | 2.59% |
| Skilled labour supply | 3 | 2.59% |
| Time | 3 | 2.59% |
| Taxes | 4 | 3.45% |
| Communications infrastructure | 5 | 4.31% |
| Financing | 5 | 4.31% |
| Problems with development approvals | 5 | 4.31% |
| Expansion costs | 6 | 5.17% |
| Local Regulations | 6 | 5.17% |
| Road conditions | 6 | 5.17% |
| Economic uncertainty | 11 | 9.48% |
| Lack of Suitable Premises | 11 | 9.48% |
| Demand for service / product | 14 | 12.07% |
| Total | 104 | |

| | |
|--|------|
| Survey Participants: | 795 |
| Question Respondents: | 116 |
| No Response Count: | 0 |
| Parent Question 'Other (please specify):' Respondents: | 115 |
| Parent Question Respondents: | 388 |
| Response Rate: | 100% |

| | Count | Percent of Question Respondents |
|--|--------------|--|
| Have you approached anybody in local/provincial/federal government or business development organizations to discuss your expansion plans? | | |
| Yes | 104 | 28.26% |
| No | 264 | 71.74% |
| Total | 368 | |

Survey Participants: 795
 Question Respondents: 368
 No Response Count: 427
 Response Rate: 46%

| | Count | Percent of Question Respondents |
|---|--------------|--|
| If Yes, which have you approached? | | |
| Chamber of Commerce | 10 | 10.64% |
| Community Futures | 12 | 12.77% |
| BC Ministry responsible for Economic Development | 15 | 15.96% |
| BC Hydro | 16 | 17.02% |
| Local Economic Development Office | 24 | 25.53% |
| Local Council | 37 | 39.36% |
| Other (please specify): | 54 | 57.45% |
| Total | 168 | |

Survey Participants: 795
 Question Respondents: 94
 No Response Count: 10
 Parent Question 'Yes' Respondents: 104
 Parent Question Respondents: 368
 Response Rate: 90%

| | Count | Percent of Question Respondents |
|--|-------|---------------------------------|
| If Yes, which have you approached?: Other (please specify) | | |
| ADP (Automatic Data Processing) | 1 | 1.06% |
| BC Transportation | 1 | 1.06% |
| Building inspector | 1 | 1.06% |
| CP Rail | 1 | 1.06% |
| Chamber of Mines | 1 | 1.06% |
| City Planners | 1 | 1.06% |
| Company management | 1 | 1.06% |
| Corporate head office | 1 | 1.06% |
| Federal Government | 1 | 1.06% |
| Fortis | 1 | 1.06% |
| Front Counter BC | 1 | 1.06% |
| Industry Canada | 1 | 1.06% |
| Industry programs | 1 | 1.06% |
| Interior Health | 1 | 1.06% |
| KAST (Kootenay Association for Science & Technology) | 1 | 1.06% |
| Ktunaxa Nation | 1 | 1.06% |
| Landlord | 1 | 1.06% |
| Local business | 1 | 1.06% |
| Mayor | 1 | 1.06% |
| Municipal official | 1 | 1.06% |
| Nav Canada | 1 | 1.06% |
| Province of British Columbia | 1 | 1.06% |
| SRED (Scientific Research and Experimental Development Tax Incentive Program) | 1 | 1.06% |
| School District | 1 | 1.06% |
| Selkirk College | 1 | 1.06% |
| BC Ministry | 2 | 2.13% |
| CFDC (Community Futures British Columbia) | 2 | 2.13% |
| IRAP (Industrial Research Assistance Program) | 2 | 2.13% |
| KRIC (Kootenay Rockies Innovation Council) | 2 | 2.13% |

| | Count | Percent of Question Respondents |
|---|-------|---------------------------------|
| If Yes, which have you approached?: Other (please specify) | | |
| RDCK (Regional District of Central Kootenay) | 2 | 2.13% |
| RDKB (Regional District of Kootenay Boundary) | 2 | 2.13% |
| Teck | 2 | 2.13% |
| BBA (Basin Business Advisors) | 3 | 3.19% |
| BDC (Business Development Bank of Canada) | 3 | 3.19% |
| Liquor Control and Licensing Branch - Ministry of Justice | 3 | 3.19% |
| Banks / Credit unions | 5 | 5.32% |
| CBT (Columbia Basin Trust) | 5 | 5.32% |
| Total | 58 | |

| | |
|--------------------------------------|-----|
| Survey Participants: | 795 |
| Question Respondents: | 53 |
| No Response Count: | 1 |
| Parent Question 'Other' Respondents: | 54 |
| Parent Question Respondents: | 94 |
| Response Rate: | 98% |

| | Count | Percent of Question Respondents |
|--|-------|---------------------------------|
| Are there any local expansion plans in the next 12 - 18 months? | | |
| Yes | 231 | 34.79% |
| No | 433 | 65.21% |
| Total | 664 | |

| | |
|-----------------------|-----|
| Survey Participants: | 795 |
| Question Respondents: | 664 |
| No Response Count: | 131 |
| Response Rate: | 84% |

FACILITY UPGRADES

| | Count | Percent of Question Respondents |
|--|-------|---------------------------------|
| Have there been any recent facility upgrades? | | |
| Yes | 100 | 64.94% |
| No | 54 | 35.06% |
| Total | 154 | |

Survey Participants: 795
 Question Respondents: 154
 No Response Count: 641
 Response Rate: 19%

| | Count | Percent of Question Respondents |
|---|-------|---------------------------------|
| Have there been any recent facility upgrades? If Yes, when?: Month scale | | |
| 3 | 24 | 25.26% |
| 6 | 14 | 14.74% |
| 12 | 20 | 21.05% |
| 18 | 8 | 8.42% |
| 24 | 15 | 15.79% |
| 36 | 14 | 14.74% |
| Total | 95 | |

Survey Participants: 795
 Question Respondents: 95
 No Response Count: 5
 Parent Question 'Yes' Respondents: 100
 Parent Question Respondents: 154
 Response Rate: 95%

| | Count | Percent of Question Respondents |
|---|-------|---------------------------------|
| Planning any upgrades to the facility? | | |
| Yes | 77 | 51.33% |
| No | 73 | 48.67% |
| Total | 150 | |

Survey Participants: 795
 Question Respondents: 150
 No Response Count: 645
 Response Rate: 19%

| | Count | Percent of Question Respondents |
|--|-------|---------------------------------|
| Planning any upgrades to the facility? If Yes, when?: Month scale | | |
| 3 | 25 | 35.21% |
| 6 | 19 | 26.76% |
| 12 | 15 | 21.13% |
| 18 | 2 | 2.82% |
| 24 | 8 | 11.27% |
| 36 | 2 | 2.82% |
| Total | 71 | |

Survey Participants: 795
 Question Respondents: 71
 No Response Count: 6
 Parent Question 'Yes' Respondents: 77
 Parent Question Respondents: 150
 Response Rate: 92%

| | Count | Percent of Question Respondents |
|--|-------|---------------------------------|
| If No, are there any barriers to upgrading you wish to identify? | | |
| No | 1 | 7.69% |
| All of the buildings are leased and JG responsible for improvements. Plan is to build a new facility and so investment in the current facilities would be a waste of capital. | 1 | 7.69% |
| Big Eddy Is neglected Water supply and permits | 1 | 7.69% |
| Building code restrictions high cost associated with code Amperage Limitations | 1 | 7.69% |
| City approval process Frustration with city and zoning bylaws, restrictions and regulations wishing to upgrade but not wanting to go through the process | 1 | 7.69% |
| Existing tenant in space that company is looking to expand into. | 1 | 7.69% |
| Finances. Could use some grant/money to make the building more stable Preserve a heritage building | 1 | 7.69% |
| Hostility from the city tax too many rules about appearance of building | 1 | 7.69% |
| Looking to increase capacity before upgrading | 1 | 7.69% |
| Parking lot is owned by BC Transportation Pending change in ownership | 1 | 7.69% |
| financial funding is pending. | 1 | 7.69% |
| financial permits | 1 | 7.69% |
| financing getting a new building for the food bank | 1 | 7.69% |
| Total | 13 | |

| | |
|-----------------------------------|-----|
| Survey Participants: | 795 |
| Question Respondents: | 13 |
| No Response Count: | 60 |
| Parent Question 'No' Respondents: | 73 |
| Parent Question Respondents: | 150 |
| Response Rate: | 18% |

ENERGY EFFICIENCY

| | Count | Percent of Question Respondents |
|---|-------|---------------------------------|
| Are you aware of BC Hydro Power Smart resources that are available to you? | | |
| Yes | 459 | 67.11% |
| No | 225 | 32.89% |
| Total | 684 | |

Survey Participants: 795

Question Respondents: 684

No Response Count: 111

Response Rate: 86%

| | Count | Percent of Question Respondents |
|---|-------|---------------------------------|
| Have you factored improvements in energy efficiency in your expansion plans? | | |
| Yes | 77 | 47.83% |
| No | 84 | 52.17% |
| Total | 161 | |

Survey Participants: 609

Question Respondents: 161

No Response Count: 448

Response Rate: 26%

GOVERNMENT SERVICES

RATINGS

| Government Services | Not Applicable | % Not Applicable | Poor | % Poor | Fair | % Fair | Good | % Good | Excellent | % Excellent | Respondents |
|---|----------------|------------------|------|--------|------|--------|------|--------|-----------|-------------|-------------|
| Access to Port Facilities | 122 | 75.78% | 20 | 12.42% | 9 | 5.59% | 9 | 5.59% | 1 | 0.62% | 161 |
| Access to US Border | 57 | 31.49% | 10 | 5.52% | 25 | 13.81% | 71 | 39.23% | 18 | 9.94% | 181 |
| Access to airport facilities | 120 | 17.91% | 173 | 25.82% | 126 | 18.81% | 165 | 24.63% | 86 | 12.84% | 670 |
| Access to highway/ roads | 13 | 1.83% | 48 | 6.74% | 99 | 13.90% | 349 | 49.02% | 203 | 28.51% | 712 |
| Access to markets | 27 | 4.05% | 56 | 8.41% | 165 | 24.77% | 302 | 45.35% | 116 | 17.42% | 666 |
| Access to suppliers | 28 | 4.13% | 85 | 12.54% | 215 | 31.71% | 275 | 40.56% | 75 | 11.06% | 678 |
| Availability of appropriately zoned land | 181 | 33.15% | 103 | 18.86% | 83 | 15.20% | 153 | 28.02% | 26 | 4.76% | 546 |
| Availability of buildings for lease or purchase | 142 | 24.74% | 133 | 23.17% | 102 | 17.77% | 160 | 27.87% | 37 | 6.45% | 574 |
| Availability of rail transport | 325 | 68.28% | 86 | 18.07% | 17 | 3.57% | 29 | 6.09% | 19 | 3.99% | 476 |
| Availability of road transport services | 46 | 7.08% | 103 | 15.85% | 157 | 24.15% | 274 | 42.15% | 70 | 10.77% | 650 |
| Availability of warehousing | 252 | 49.61% | 91 | 17.91% | 65 | 12.80% | 83 | 16.34% | 17 | 3.35% | 508 |
| Development approval process | 167 | 31.39% | 117 | 21.99% | 80 | 15.04% | 139 | 26.13% | 29 | 5.45% | 532 |
| Disposal of waste material | 66 | 10.73% | 73 | 11.87% | 112 | 18.21% | 290 | 47.15% | 74 | 12.03% | 615 |
| Inspections | 92 | 15.18% | 51 | 8.42% | 94 | 15.51% | 312 | 51.49% | 57 | 9.41% | 606 |

| Government Services | Not Applicable | % Not Applicable | Poor | % Poor | Fair | % Fair | Good | % Good | Excellent | % Excellent | Respondents |
|-------------------------------------|----------------|------------------|------|--------|------|--------|------|--------|-----------|-------------|-------------|
| /licensing | | | | % | | % | | % | | | |
| Recycling | 29 | 4.39% | 70 | 10.61% | 122 | 18.48% | 324 | 49.09% | 115 | 17.42% | 660 |
| Telecommunications (internet, cell) | 7 | 1.04% | 148 | 22.02% | 170 | 25.30% | 278 | 41.37% | 69 | 10.27% | 672 |
| Water and sewerage supply | 71 | 11.64% | 48 | 7.87% | 66 | 10.82% | 332 | 54.43% | 93 | 15.25% | 610 |

Survey Participants: 795

| | Count | Percent of Question Respondents |
|--|-------|---------------------------------|
| Please rate the following: Access to airport facilities | | |
| Excellent | 86 | 12.84% |
| Good | 165 | 24.63% |
| Fair | 126 | 18.81% |
| Poor | 173 | 25.82% |
| Not applicable | 120 | 17.91% |
| Total | 670 | |

Survey Participants: 795
 Question Respondents: 670
 No Response Count: 125
 Response Rate: 84%

| | Count | Percent of Question Respondents |
|---|-------|---------------------------------|
| Please rate the following: Access to highway/roadway | | |
| Excellent | 203 | 28.51% |
| Good | 349 | 49.02% |
| Fair | 99 | 13.90% |
| Poor | 48 | 6.74% |
| Not applicable | 13 | 1.83% |
| Total | 712 | |

Survey Participants: 795
Question Respondents: 712
No Response Count: 83
Response Rate: 90%

| | Count | Percent of Question Respondents |
|---|-------|---------------------------------|
| Please rate the following: Access to markets | | |
| Excellent | 116 | 17.42% |
| Good | 302 | 45.35% |
| Fair | 165 | 24.77% |
| Poor | 56 | 8.41% |
| Not applicable | 27 | 4.05% |
| Total | 666 | |

Survey Participants: 795
Question Respondents: 666
No Response Count: 129
Response Rate: 84%

| | Count | Percent of Question Respondents |
|---|-------|---------------------------------|
| Please rate the following: Access to suppliers | | |
| Excellent | 75 | 11.06% |
| Good | 275 | 40.56% |
| Fair | 215 | 31.71% |
| Poor | 85 | 12.54% |
| Not applicable | 28 | 4.13% |
| Total | 678 | |

Survey Participants: 795
 Question Respondents: 678
 No Response Count: 117
 Response Rate: 85%

| | Count | Percent of Question Respondents |
|---|-------|---------------------------------|
| Please rate the following: Availability of Couriers and other road transportation services | | |
| Excellent | 70 | 10.77% |
| Good | 274 | 42.15% |
| Fair | 157 | 24.15% |
| Poor | 103 | 15.85% |
| Not applicable | 46 | 7.08% |
| Total | 650 | |

Survey Participants: 795
 Question Respondents: 650
 No Response Count: 145
 Response Rate: 82%

| | Count | Percent of Question Respondents |
|--|-------|---------------------------------|
| Please rate the following: Availability of rail transport | | |
| Excellent | 19 | 3.99% |
| Good | 29 | 6.09% |
| Fair | 17 | 3.57% |
| Poor | 86 | 18.07% |
| Not applicable | 325 | 68.28% |
| Total | 476 | |

Survey Participants: 795
 Question Respondents: 476
 No Response Count: 319
 Response Rate: 60%

| | Count | Percent of Question Respondents |
|---|-------|---------------------------------|
| Please rate the following: Availability of warehousing | | |
| Excellent | 17 | 3.35% |
| Good | 83 | 16.34% |
| Fair | 65 | 12.80% |
| Poor | 91 | 17.91% |
| Not applicable | 252 | 49.61% |
| Total | 508 | |

Survey Participants: 795
 Question Respondents: 508
 No Response Count: 287
 Response Rate: 64%

| | Count | Percent of Question Respondents |
|--|-------|---------------------------------|
| Please rate the following: Disposal of waste material | | |
| Excellent | 74 | 12.03% |
| Good | 290 | 47.15% |
| Fair | 112 | 18.21% |
| Poor | 73 | 11.87% |
| Not applicable | 66 | 10.73% |
| Total | 615 | |

Survey Participants: 795

Question Respondents: 615

No Response Count: 180

Response Rate: 77%

| | Count | Percent of Question Respondents |
|---|-------|---------------------------------|
| Please rate the following: Recycling | | |
| Excellent | 115 | 17.42% |
| Good | 324 | 49.09% |
| Fair | 122 | 18.48% |
| Poor | 70 | 10.61% |
| Not applicable | 29 | 4.39% |
| Total | 660 | |

Survey Participants: 795

Question Respondents: 660

No Response Count: 135

Response Rate: 83%

| | Count | Percent of Question Respondents |
|--|-------|---------------------------------|
| Please rate the following: Inspections (eg licensing) | | |
| Excellent | 57 | 9.41% |
| Good | 312 | 51.49% |
| Fair | 94 | 15.51% |
| Poor | 51 | 8.42% |
| Not applicable | 92 | 15.18% |
| Total | 606 | |

Survey Participants: 795
 Question Respondents: 606
 No Response Count: 189
 Response Rate: 76%

| | Count | Percent of Question Respondents |
|--|-------|---------------------------------|
| Please rate the following: Development approval process | | |
| Excellent | 29 | 5.45% |
| Good | 139 | 26.13% |
| Fair | 80 | 15.04% |
| Poor | 117 | 21.99% |
| Not applicable | 167 | 31.39% |
| Total | 532 | |

Survey Participants: 795
 Question Respondents: 532
 No Response Count: 263
 Response Rate: 67%

| | Count | Percent of Question Respondents |
|--|-------|---------------------------------|
| Please rate the following: Telecommunications (tel, Internet, Cell) | | |
| Excellent | 69 | 10.27% |
| Good | 278 | 41.37% |
| Fair | 170 | 25.30% |
| Poor | 148 | 22.02% |
| Not applicable | 7 | 1.04% |
| Total | 672 | |

Survey Participants: 795
Question Respondents: 672
No Response Count: 123
Response Rate: 85%

| | Count | Percent of Question Respondents |
|---|-------|---------------------------------|
| Please rate the following: Availability of buildings for lease or purchase | | |
| Excellent | 37 | 6.45% |
| Good | 160 | 27.87% |
| Fair | 102 | 17.77% |
| Poor | 133 | 23.17% |
| Not applicable | 142 | 24.74% |
| Total | 574 | |

Survey Participants: 795
Question Respondents: 574
No Response Count: 221
Response Rate: 72%

| | Count | Percent of Question Respondents |
|--|-------|---------------------------------|
| Please rate the following: Availability of appropriately zoned land | | |
| Excellent | 26 | 4.76% |
| Good | 153 | 28.02% |
| Fair | 83 | 15.20% |
| Poor | 103 | 18.86% |
| Not applicable | 181 | 33.15% |
| Total | 546 | |

Survey Participants: 795
Question Respondents: 546
No Response Count: 249
Response Rate: 69%

| | Count | Percent of Question Respondents |
|---|-------|---------------------------------|
| Please rate the following: Water and sewerage supply | | |
| Excellent | 93 | 15.25% |
| Good | 332 | 54.43% |
| Fair | 66 | 10.82% |
| Poor | 48 | 7.87% |
| Not applicable | 71 | 11.64% |
| Total | 610 | |

Survey Participants: 795
Question Respondents: 610
No Response Count: 185
Response Rate: 77%

| | Count | Percent of Question Respondents |
|---|-------|---------------------------------|
| Please rate the following: Access to US Border | | |
| Excellent | 18 | 9.94% |
| Good | 71 | 39.23% |
| Fair | 25 | 13.81% |
| Poor | 10 | 5.52% |
| Not applicable | 57 | 31.49% |
| Total | 181 | |

Survey Participants: 795
 Question Respondents: 181
 No Response Count: 614
 Response Rate: 23%

| | Count | Percent of Question Respondents |
|---|-------|---------------------------------|
| Please rate the following: Access to Port Facilities | | |
| Excellent | 1 | 0.62% |
| Good | 9 | 5.59% |
| Fair | 9 | 5.59% |
| Poor | 20 | 12.42% |
| Not applicable | 122 | 75.78% |
| Total | 161 | |

Survey Participants: 795
 Question Respondents: 161
 No Response Count: 634
 Response Rate: 20%

| | | Count | Percent of Question Respondents |
|--|--|-------|---------------------------------|
| Please rate the following: Other (please specify) | Please rate the following: Other (please specify) | | |
| Access to public washrooms | Poor | 2 | 1.22% |
| Availability of Parking | Poor | 3 | 1.83% |
| B.C Hydro | Poor | 1 | 0.61% |
| BCSA | Poor | 1 | 0.61% |
| Canada Post | Poor | 1 | 0.61% |
| Canada Revenue Services for Small Businesses | Poor | 1 | 0.61% |
| Canadian Revenue Agency | Poor | 1 | 0.61% |
| Cell Service | Poor | 3 | 1.83% |
| Child care | Poor | 1 | 0.61% |
| Condition of Highway | Poor | 1 | 0.61% |
| Emergency Services | Fair | 1 | 0.61% |
| | Good | 1 | 0.61% |
| | Poor | 5 | 3.05% |
| Federal- Employment and Migration | Poor | 1 | 0.61% |
| Ferry Service | Excellent | 1 | 0.61% |
| | Fair | 1 | 0.61% |
| | Not applicable | 2 | 1.22% |
| | Poor | 30 | 18.29% |
| FortisBC pricing | Good | 1 | 0.61% |
| Front Counter BC | Poor | 1 | 0.61% |
| Healthcare | Poor | 1 | 0.61% |
| Higway Maintenance | Poor | 2 | 1.22% |
| Hospital services | Good | 1 | 0.61% |
| | Poor | 2 | 1.22% |
| International workers program | Poor | 1 | 0.61% |
| Maintenance of landscaping | Poor | 1 | 0.61% |
| Marketing | Poor | 1 | 0.61% |
| Natural gas | Good | 1 | 0.61% |

| | | Count | Percent of Question Respondents |
|---|--|-------|---------------------------------|
| Please rate the following: Other (please specify) | Please rate the following: Other (please specify) | | |
| Permits (national) | Poor | 1 | 0.61% |
| Police services | Fair | 1 | 0.61% |
| | Good | 1 | 0.61% |
| Port services/ customs and clearances | Poor | 1 | 0.61% |
| Power outages | Good | 1 | 0.61% |
| | Not applicable | 1 | 0.61% |
| | Poor | 7 | 4.27% |
| Promoting the community (growth) | Poor | 1 | 0.61% |
| Proper Signage | Poor | 2 | 1.22% |
| Provide information regarding geothermal regulations | Poor | 1 | 0.61% |
| ROE Online | Excellent | 1 | 0.61% |
| Regional Government Services | Good | 1 | 0.61% |
| Resort Development Branch-Provincial Government | Good | 1 | 0.61% |
| SR & ED Tax Incentive Program | Poor | 1 | 0.61% |
| Service Canada | Poor | 5 | 3.05% |
| Sewage not available | Not applicable | 1 | 0.61% |
| | Poor | 1 | 0.61% |
| Small business training and education | Excellent | 1 | 0.61% |
| Snow Removal | Excellent | 5 | 3.05% |
| | Fair | 12 | 7.32% |
| | Good | 16 | 9.76% |
| | Not applicable | 7 | 4.27% |
| | Poor | 7 | 4.27% |
| Telus | Poor | 1 | 0.61% |
| Tourism BC | Poor | 1 | 0.61% |
| Transit (local) | Poor | 1 | 0.61% |

| | | Count | Percent of Question Respondents |
|--|--|-------|---------------------------------|
| Please rate the following: Other (please specify) | Please rate the following: Other (please specify) | | |
| WCB | Poor | 1 | 0.61% |
| Water | Good | 1 | 0.61% |
| Work BC | Good | 1 | 0.61% |
| Total | | 151 | 92.07% |

Survey Participants: 795
 Question Respondents: 164
 No Response Count: 631
 Response Rate: 21%

IMPROVEMENTS

| | Count | Percent of Question Respondents |
|---|-------|---------------------------------|
| Do you have any suggestions on how to improve any of the services and infrastructure listed above? | | |
| Yes | 472 | 67.14% |
| No | 231 | 32.86% |
| Total | 703 | |

Survey Participants: 795
 Question Respondents: 703
 No Response Count: 92
 Response Rate: 88%

| | Count | Percent of Question Respondents |
|---|--------------|--|
| Do you have any suggestions on how to improve any of the services and infrastructure listed above?: If Yes, how? | | |
| Streamline granting of permits | 7 | 1.50% |
| Provide emergency services | 9 | 1.93% |
| Address land zoning issues | 11 | 2.36% |
| Increase attention to community and business needs | 11 | 2.36% |
| Improve sewage and waste water management | 12 | 2.57% |
| Increase public transportation | 12 | 2.57% |
| More support for tourism | 12 | 2.57% |
| Consider more and proper signage | 16 | 3.43% |
| Restructure taxes | 18 | 3.85% |
| Provide a cost effective shipping and receiving service | 19 | 4.07% |
| Streamline development approval processes | 21 | 4.50% |
| Provide reliable electric power | 24 | 5.14% |
| Improve ferry service | 36 | 7.71% |
| Improve recycling and waste management | 50 | 10.71% |
| Improve highway and road quality and service | 56 | 11.99% |
| Increase airport services | 58 | 12.42% |
| Expand electronic communication services (Cell phone/ Internet/ Broadband/Fiber) | 137 | 29.34% |
| Total | 509 | |

| | |
|------------------------------------|-----|
| Survey Participants: | 795 |
| Question Respondents: | 467 |
| No Response Count: | 5 |
| Parent Question 'Yes' Respondents: | 472 |
| Parent Question Respondents: | 703 |
| Response Rate: | 99% |

AIRPORT

| | Count | Percent of Question Respondents |
|---|-------|---------------------------------|
| Which airport services do you use? | | |
| Bellingham | 1 | 0.68% |
| Castlgar | 1 | 0.68% |
| Seattle | 2 | 1.37% |
| Kamloops | 3 | 2.05% |
| Vancouver | 6 | 4.11% |
| Kalispell | 11 | 7.53% |
| Trail | 11 | 7.53% |
| Spokane | 25 | 17.12% |
| Cranbrook | 26 | 17.81% |
| Castlegar | 35 | 23.97% |
| Calgary | 38 | 26.03% |
| Kelowna | 53 | 36.30% |
| None | 23 | 15.75% |
| Total | 235 | |

Survey Participants: 795

Question Respondents: 146

No Response Count: 649

Response Rate: 18%

| | Count | Percent of Question Respondents |
|--|--------------|--|
| Which airport services do you use?: What services would you like to see at the local airport? (where appropriate) | | |
| Better radar | 1 | 1.01% |
| Develop as a park | 1 | 1.01% |
| Improved security | 1 | 1.01% |
| Improvemnts to navigational aids | 1 | 1.01% |
| Modest improvements | 1 | 1.01% |
| More airlines | 1 | 1.01% |
| Needs aircraft | 1 | 1.01% |
| Rental cars | 1 | 1.01% |
| Tourist information center | 1 | 1.01% |
| Charter service | 2 | 2.02% |
| Commercial flights | 2 | 2.02% |
| Lower fares | 2 | 2.02% |
| More destinations | 2 | 2.02% |
| Tourism services | 2 | 2.02% |
| Courier service | 3 | 3.03% |
| Extended runway | 3 | 3.03% |
| International flights | 3 | 3.03% |
| More flights | 3 | 3.03% |
| Passenger service | 3 | 3.03% |
| Development of a local airport | 4 | 4.04% |
| Larger aircraft | 4 | 4.04% |
| Shuttle service | 9 | 9.09% |
| Better flight reliability | 10 | 10.10% |
| Commuter flights | 13 | 13.13% |
| Total | 74 | |

Survey Participants: 795
Question Respondents: 99
No Response Count: 696
Response Rate: 12%

BUSINESS CLIMATE

QUALITY OF BUSINESS CLIMATE

| Business climate ratings | No Opinion | % No Opinion | Poor | % Poor | Fair | % Fair | Good | % Good | Excellent | % Excellent | Respondents |
|---------------------------------|------------|--------------|------|--------|------|--------|------|--------|-----------|-------------|-------------|
| BIA | 67 | 72.04% | 5 | 5.38% | 4 | 4.30% | 9 | 9.68% | 8 | 8.60% | 93 |
| Chamber of Commerce | 29 | 16.76% | 17 | 9.83% | 40 | 23.12% | 64 | 36.99% | 23 | 13.29% | 173 |
| Colleges/Universities | 140 | 19.86% | 115 | 16.31% | 151 | 21.42% | 265 | 37.59% | 34 | 4.82% | 705 |
| Community Futures | 54 | 31.58% | 15 | 8.77% | 20 | 11.70% | 58 | 33.92% | 24 | 14.04% | 171 |
| Cultural/Recreational Amenities | 21 | 2.92% | 59 | 8.19% | 153 | 21.25% | 303 | 42.08% | 184 | 25.56% | 720 |
| Economic Development | 74 | 10.32% | 208 | 29.01% | 223 | 31.10% | 192 | 26.78% | 20 | 2.79% | 717 |
| Housing | 38 | 5.29% | 163 | 22.67% | 260 | 36.16% | 233 | 32.41% | 25 | 3.48% | 719 |
| K-12 education | 97 | 13.60% | 75 | 10.52% | 125 | 17.53% | 335 | 46.98% | 81 | 11.36% | 713 |
| Local Government | 67 | 9.38% | 124 | 17.37% | 225 | 31.51% | 244 | 34.17% | 54 | 7.56% | 714 |
| Local Tax Structure | 103 | 14.57% | 160 | 22.63% | 249 | 35.22% | 167 | 23.62% | 28 | 3.96% | 707 |
| Technical Training | 139 | 20.26% | 230 | 33.53% | 169 | 24.64% | 127 | 18.51% | 21 | 3.06% | 686 |
| Tourism services | 18 | 9.89% | 17 | 9.34% | 41 | 22.53% | 82 | 45.05% | 24 | 13.19% | 182 |
| Workforce Availability | 36 | 5.02% | 192 | 26.78% | 253 | 35.29% | 192 | 26.78% | 44 | 6.14% | 717 |
| Workforce Quality | 36 | 5.01% | 89 | 12.38% | 217 | 30.18% | 292 | 40.61% | 85 | 11.82% | 719 |
| Workforce Stability | 45 | 6.28% | 167 | 23.29% | 226 | 31.52% | 229 | 31.94% | 50 | 6.97% | 717 |

Survey Participants: 795

| | Count | Percent of Question Respondents |
|---|-------|---------------------------------|
| Please rate the following: Workforce quality | | |
| Excellent | 85 | 11.82% |
| Good | 292 | 40.61% |
| Fair | 217 | 30.18% |
| Poor | 89 | 12.38% |
| No opinion | 36 | 5.01% |
| Total | 719 | |

Survey Participants: 795
Question Respondents: 719
No Response Count: 76
Response Rate: 90%

| | Count | Percent of Question Respondents |
|--|-------|---------------------------------|
| Please rate the following: Workforce availability | | |
| Excellent | 44 | 6.14% |
| Good | 192 | 26.78% |
| Fair | 253 | 35.29% |
| Poor | 192 | 26.78% |
| No opinion | 36 | 5.02% |
| Total | 717 | |

Survey Participants: 795
Question Respondents: 717
No Response Count: 78
Response Rate: 90%

| | Count | Percent of Question Respondents |
|---|-------|---------------------------------|
| Please rate the following: Workforce stability | | |
| Excellent | 50 | 6.97% |
| Good | 229 | 31.94% |
| Fair | 226 | 31.52% |
| Poor | 167 | 23.29% |
| No opinion | 45 | 6.28% |
| Total | 717 | |

Survey Participants: 795
 Question Respondents: 717
 No Response Count: 78
 Response Rate: 90%

| | Count | Percent of Question Respondents |
|--|-------|---------------------------------|
| Please rate the following: Local government | | |
| Excellent | 54 | 7.56% |
| Good | 244 | 34.17% |
| Fair | 225 | 31.51% |
| Poor | 124 | 17.37% |
| No opinion | 67 | 9.38% |
| Total | 714 | |

Survey Participants: 795
 Question Respondents: 714
 No Response Count: 81
 Response Rate: 90%

| | Count | Percent of Question Respondents |
|---|-------|---------------------------------|
| Please rate the following: Local tax structure | | |
| Excellent | 28 | 3.96% |
| Good | 167 | 23.62% |
| Fair | 249 | 35.22% |
| Poor | 160 | 22.63% |
| No opinion | 103 | 14.57% |
| Total | 707 | |

Survey Participants: 795
 Question Respondents: 707
 No Response Count: 88
 Response Rate: 89%

| | Count | Percent of Question Respondents |
|--|-------|---------------------------------|
| Please rate the following: Economic development | | |
| Excellent | 20 | 2.79% |
| Good | 192 | 26.78% |
| Fair | 223 | 31.10% |
| Poor | 208 | 29.01% |
| No opinion | 74 | 10.32% |
| Total | 717 | |

Survey Participants: 795
 Question Respondents: 717
 No Response Count: 78
 Response Rate: 90%

| | Count | Percent of Question Respondents |
|---|-------|---------------------------------|
| Please rate the following: Cultural/Recreational amenities | | |
| Excellent | 184 | 25.56% |
| Good | 303 | 42.08% |
| Fair | 153 | 21.25% |
| Poor | 59 | 8.19% |
| No opinion | 21 | 2.92% |
| Total | 720 | |

Survey Participants: 795
 Question Respondents: 720
 No Response Count: 75
 Response Rate: 91%

| | Count | Percent of Question Respondents |
|---|-------|---------------------------------|
| Please rate the following: Housing | | |
| Excellent | 25 | 3.48% |
| Good | 233 | 32.41% |
| Fair | 260 | 36.16% |
| Poor | 163 | 22.67% |
| No opinion | 38 | 5.29% |
| Total | 719 | |

Survey Participants: 795
 Question Respondents: 719
 No Response Count: 76
 Response Rate: 90%

| | Count | Percent of Question Respondents |
|---|-------|---------------------------------|
| Please rate the following: Chamber of Commerce | | |
| Excellent | 23 | 13.29% |
| Good | 64 | 36.99% |
| Fair | 40 | 23.12% |
| Poor | 17 | 9.83% |
| No opinion | 29 | 16.76% |
| Total | 173 | |

Survey Participants: 795
 Question Respondents: 173
 No Response Count: 622
 Response Rate: 22%

| | Count | Percent of Question Respondents |
|--|-------|---------------------------------|
| Please rate the following: Tourism services | | |
| Excellent | 24 | 13.19% |
| Good | 82 | 45.05% |
| Fair | 41 | 22.53% |
| Poor | 17 | 9.34% |
| No opinion | 18 | 9.89% |
| Total | 182 | |

Survey Participants: 795
 Question Respondents: 182
 No Response Count: 613
 Response Rate: 23%

| | Count | Percent of Question Respondents |
|---|-------|---------------------------------|
| Please rate the following: BIA (where appropriate) | | |
| Excellent | 8 | 8.60% |
| Good | 9 | 9.68% |
| Fair | 4 | 4.30% |
| Poor | 5 | 5.38% |
| No opinion | 67 | 72.04% |
| Total | 93 | |

Survey Participants: 795
 Question Respondents: 93
 No Response Count: 702
 Response Rate: 12%

| | Count | Percent of Question Respondents |
|---|-------|---------------------------------|
| Please rate the following: Community Futures (where appropriate) | | |
| Excellent | 24 | 14.04% |
| Good | 58 | 33.92% |
| Fair | 20 | 11.70% |
| Poor | 15 | 8.77% |
| No opinion | 54 | 31.58% |
| Total | 171 | |

Survey Participants: 795
 Question Respondents: 171
 No Response Count: 624
 Response Rate: 22%

| | Count | Percent of Question Respondents |
|--|-------|---------------------------------|
| Please rate the following: K - 12 education | | |
| Excellent | 81 | 11.36% |
| Good | 335 | 46.98% |
| Fair | 125 | 17.53% |
| Poor | 75 | 10.52% |
| No opinion | 97 | 13.60% |
| Total | 713 | |

Survey Participants: 795
 Question Respondents: 713
 No Response Count: 82
 Response Rate: 90%

| | Count | Percent of Question Respondents |
|---|-------|---------------------------------|
| Please rate the following: Colleges/Universities | | |
| Excellent | 34 | 4.82% |
| Good | 265 | 37.59% |
| Fair | 151 | 21.42% |
| Poor | 115 | 16.31% |
| No opinion | 140 | 19.86% |
| Total | 705 | |

Survey Participants: 795
 Question Respondents: 705
 No Response Count: 90
 Response Rate: 89%

| | Count | Percent of Question Respondents |
|--|-------|---------------------------------|
| Please rate the following: Technical training | | |
| Excellent | 21 | 3.06% |
| Good | 127 | 18.51% |
| Fair | 169 | 24.64% |
| Poor | 230 | 33.53% |
| No opinion | 139 | 20.26% |
| Total | 686 | |

Survey Participants: 795
 Question Respondents: 686
 No Response Count: 109
 Response Rate: 86%

| | Count | Percent of Question Respondents |
|---|-------|---------------------------------|
| Please rate the local business climate | | |
| Excellent | 30 | 3.99% |
| Good | 283 | 37.63% |
| Fair | 323 | 42.95% |
| Poor | 116 | 15.43% |
| Total | 752 | |

Survey Participants: 795
 Question Respondents: 752
 No Response Count: 43
 Response Rate: 95%

| | Count | Percent of Question Respondents |
|---|-------|---------------------------------|
| Please compare the local business climate today versus 5 years ago | | |
| Better today | 221 | 30.36% |
| No change | 164 | 22.53% |
| Worse today | 278 | 38.19% |
| No opinion | 65 | 8.93% |
| Total | 728 | |

Survey Participants: 795
Question Respondents: 728
No Response Count: 67
Response Rate: 92%

| | Count | Percent of Question Respondents |
|---|-------|---------------------------------|
| Please compare the local business climate today versus 5 years ago: If worse today, why? | | |
| More competition | 6 | 2.39% |
| Less tourists | 8 | 3.19% |
| Locals shopping elsewhere | 11 | 4.38% |
| Mine closure | 11 | 4.38% |
| Strong Canadian dollar | 11 | 4.38% |
| Disposable income is down | 14 | 5.58% |
| Declining employment | 15 | 5.98% |
| Population (low/aging/declining) | 20 | 7.97% |
| Businesses closing | 24 | 9.56% |
| Forestry downturn | 28 | 11.16% |
| Recession | 28 | 11.16% |
| Declining economy | 74 | 29.48% |
| Total | 250 | |

Survey Participants: 795
Question Respondents: 251
No Response Count: 27
Parent Question 'Worse today' Respondents: 278
Parent Question Respondents: 728
Response Rate: 90%

| | Count | Percent of Question Respondents |
|---|--------------|--|
| Do you have any forecast for the condition of the local business climate 5 years from today? | | |
| Will be better | 502 | 67.47% |
| No change | 147 | 19.76% |
| Will be worse | 48 | 6.45% |
| No opinion | 47 | 6.32% |
| Total | 744 | |

Survey Participants: 795
Question Respondents: 744
No Response Count: 51
Response Rate: 94%

STRENGTHS AND WEAKNESSES

| | Count | Percent of Question Respondents |
|--|------------|---------------------------------|
| What are the community's strengths as a place to do business? | | |
| Low crime rate | 3 | 0.43% |
| Outdoor activities | 3 | 0.43% |
| Low competition | 6 | 0.85% |
| Quality of life | 11 | 1.56% |
| Word of mouth | 15 | 2.13% |
| Above average household incomes | 20 | 2.84% |
| Social network | 20 | 2.84% |
| Affordable | 24 | 3.41% |
| Environment | 25 | 3.56% |
| Outdoor Activities | 25 | 3.56% |
| Skilled workforce | 25 | 3.56% |
| Customer loyalty | 35 | 4.98% |
| Tourism | 35 | 4.98% |
| Recreational opportunities | 36 | 5.12% |
| Stable economy | 39 | 5.55% |
| Great place to live | 48 | 6.83% |
| Strong sense of community | 79 | 11.24% |
| Lifestyle | 98 | 13.94% |
| Location | 120 | 17.07% |
| Total | 667 | |

| | |
|-----------------------|-----|
| Survey Participants: | 795 |
| Question Respondents: | 703 |
| No Response Count: | 92 |
| Response Rate: | 88% |

| | Count | Percent of Question Respondents |
|---|--------------|--|
| What are the community's weaknesses as a place to do business? | | |
| Dependent on one major industry | 2 | 0.28% |
| Reliance on tourism | 3 | 0.43% |
| Lack of support for local businesses | 4 | 0.57% |
| Poor road conditions | 7 | 0.99% |
| Available space | 15 | 2.13% |
| Cross border shopping (US/Alberta) | 23 | 3.27% |
| Seasonality | 23 | 3.27% |
| High cost of living | 25 | 3.55% |
| Tax structure | 26 | 3.69% |
| Development Constraints (Zoning/Bureaucracy/Permits) | 27 | 3.84% |
| Location | 45 | 6.39% |
| Shipping and Receiving costs | 54 | 7.67% |
| Population (size/growth/aging) | 82 | 11.65% |
| Total | 336 | |

Survey Participants: 795
Question Respondents: 704
No Response Count: 91
Response Rate: 89%

BUSINESS GROWTH

| | Count | Percent of Question Respondents |
|--|-------|---------------------------------|
| Are there any barriers to growth in this community? | | |
| Yes | 637 | 85.16% |
| No | 111 | 14.84% |
| Total | 748 | |

Survey Participants: 795
 Question Respondents: 748
 No Response Count: 47
 Response Rate: 94%

| | Count | Percent of Question Respondents |
|---|-------|---------------------------------|
| Are there any barriers to growth in this community? : If Yes, what are they? | | |
| Negative attitude | 8 | 1.28% |
| Location | 11 | 1.76% |
| Infrastructure supporting local economy | 20 | 3.20% |
| Affordable housing | 26 | 4.16% |
| Tax structure | 26 | 4.16% |
| Cost of doing business | 28 | 4.48% |
| Skilled labor | 31 | 4.96% |
| Low economic diversification | 34 | 5.44% |
| Developmental approval process | 46 | 7.36% |
| Low population | 86 | 13.76% |
| Total | 316 | |

Survey Participants: 795
 Question Respondents: 625
 No Response Count: 12
 Parent Question 'Yes' Respondents: 637
 Parent Question Respondents: 748
 Response Rate: 98%

BUSINESS GROWTH

| | Count | Percent of Question Respondents |
|---|-------|---------------------------------|
| Are there suppliers you think could locate in this region? | | |
| Yes | 228 | 34.39% |
| No | 435 | 65.61% |
| Total | 663 | |

Survey Participants: 795
 Question Respondents: 663
 No Response Count: 132
 Response Rate: 83%

| | Count | Percent of Question Respondents |
|---|-------|---------------------------------|
| Are there suppliers you think could locate in this region?: If Yes, please list | | |
| - Tech fibre network building material\n\n- Tried to get electrical wholesalers into the region (faced no interest or fear of products) | 1 | 0.47% |
| Computing hardware suppliers | 1 | 0.47% |
| Forestry Suppliers | 1 | 0.47% |
| Personal wellness services | 1 | 0.47% |
| Building supplies | 2 | 0.94% |
| Courier service | 2 | 0.94% |
| Distributors | 2 | 0.94% |
| Mining services | 2 | 0.94% |
| Solar energy | 2 | 0.94% |
| Electrical supplier | 3 | 1.42% |
| Green industries | 3 | 1.42% |
| Printing suppliers | 3 | 1.42% |
| Retail stores | 4 | 1.89% |
| Mining suppliers | 5 | 2.36% |
| Agricultural suppliers | 7 | 3.30% |
| Manufacturers | 13 | 6.13% |

| | Count | Percent of Question Respondents |
|--|-------|---------------------------------|
| Are there suppliers you think could locate in this region?: If Yes, please list | | |
| Meats & Dairy / Fruits and Vegetables / Grains | 21 | 9.91% |
| Total | 73 | |

Survey Participants: 795
 Question Respondents: 212
 No Response Count: 16
 Parent Question 'Yes' Respondents: 228
 Parent Question Respondents: 663
 Response Rate: 93%

| | Count | Percent of Question Respondents |
|---|-------|---------------------------------|
| What sectors, business or industry do you think the community should try to attract? | | |
| Yes | 555 | 80.32% |
| No | 136 | 19.68% |
| Total | 691 | |

Survey Participants: 795
 Question Respondents: 691
 No Response Count: 104
 Response Rate: 87%

| | Count | Percent of Question Respondents |
|--|-------|---------------------------------|
| What sectors, business or industry do you think the community should try to attract?: If Yes, please list | | |
| Grocery stores | 4 | 0.75% |
| Shipping companies | 5 | 0.93% |
| Construction | 6 | 1.12% |
| Internet services | 8 | 1.50% |
| Retail stores | 8 | 1.50% |

| | Count | Percent of Question Respondents |
|--|--------------|--|
| What sectors, business or industry do you think the community should try to attract?: If Yes, please list | | |
| Food businesses | 9 | 1.68% |
| Mining and exploration | 9 | 1.68% |
| Agriculture | 12 | 2.24% |
| Forestry | 12 | 2.24% |
| Creative businesses | 17 | 3.18% |
| Hospitality | 17 | 3.18% |
| Green Businesses | 18 | 3.36% |
| Health and Wellness | 18 | 3.36% |
| Arts & Culture | 26 | 4.86% |
| Manufacturing | 38 | 7.10% |
| Technology businesses | 41 | 7.66% |
| Tourism | 190 | 35.51% |
| Total | 438 | |

| | |
|------------------------------------|-----|
| Survey Participants: | 795 |
| Question Respondents: | 535 |
| No Response Count: | 20 |
| Parent Question 'Yes' Respondents: | 555 |
| Parent Question Respondents: | 691 |
| Response Rate: | 96% |

SUPPORT PROVIDERS

| Level of service from business support providers | Not Applicable | % Not Applicable | Unable to assist | % Unable to assist | Poor | % Poor | Fair | % Fair | Good | % Good | Excellent | % Excellent | Respondents |
|--|----------------|------------------|------------------|--------------------|------|--------|------|--------|------|--------|-----------|-------------|-------------|
| Basin Business Advisors | 90 | 69.77% | 15 | 11.63% | 2 | 1.55% | 2 | 1.55% | 14 | 10.85% | 6 | 4.65% | 129 |
| Chamber of Commerce | 22 | 12.57% | 8 | 4.57% | 19 | 10.86% | 37 | 21.14% | 64 | 36.57% | 25 | 14.29% | 175 |
| College Industry Liaison Officer | 78 | 60.94% | 7 | 5.47% | 2 | 1.56% | 3 | 2.34% | 25 | 19.53% | 13 | 10.16% | 128 |
| Community Futures | 64 | 45.39% | 15 | 10.64% | 6 | 4.26% | 4 | 2.84% | 29 | 20.57% | 23 | 16.31% | 141 |
| Continuing Education and Workforce Training | 54 | 39.42% | 10 | 7.30% | 3 | 2.19% | 16 | 11.68% | 43 | 31.39% | 11 | 8.03% | 137 |
| Economic Development Organization / Commission | 60 | 46.51% | 11 | 8.53% | 13 | 10.08% | 11 | 8.53% | 22 | 17.05% | 12 | 9.30% | 129 |
| Innovation Councils (Kootenay Associati | 92 | 73.60% | 13 | 10.40% | 2 | 1.60% | 4 | 3.20% | 10 | 8.00% | 4 | 3.20% | 125 |

| Level of service from business support providers | Not Applicable | % Not Applicable | Unable to assist | % Unable to assist | Poor | % Poor | Fair | % Fair | Good | % Good | Excellent | % Excellent | Respondents |
|--|----------------|------------------|------------------|--------------------|------|--------|------|--------|------|--------|-----------|-------------|-------------|
| on for Science and Technology, Kootenay Rockies Innovation Council) | | | | | | | | | | | | | |
| Invest Kootenay | 104 | 81.89% | 15 | 11.81% | 2 | 1.57% | 2 | 1.57% | 3 | 2.36% | 1 | 0.79% | 127 |
| Kootenay Aboriginal Business Advocates Society | 106 | 83.46% | 14 | 11.02% | 3 | 2.36% | 1 | 0.79% | 3 | 2.36% | 0 | 0.00% | 127 |
| National Research Council Industrial Research Assistance | 102 | 87.93% | 7 | 6.03% | 1 | 0.86% | 0 | 0.00% | 3 | 2.59% | 3 | 2.59% | 116 |
| Scientific Research and Experimental Development Tax Incentive Program | 102 | 88.70% | 8 | 6.96% | 1 | 0.87% | 0 | 0.00% | 2 | 1.74% | 2 | 1.74% | 115 |

Survey
Participants: 609

| | Count | Percent of Question Respondents |
|--|-------|---------------------------------|
| Listed below are a number of business support providers. For each of these please indicate the level of service you have had in dealing with them. If you have never had contact with them please indicate this.: Chamber of Commerce | | |
| Excellent | 25 | 14.29% |
| Good | 64 | 36.57% |
| Fair | 37 | 21.14% |
| Poor | 19 | 10.86% |
| Unable to assist | 8 | 4.57% |
| Not applicable | 22 | 12.57% |
| Total | 175 | |

Survey Participants: 609
Question Respondents: 175
No Response Count: 434
Response Rate: 29%

| | Count | Percent of Question Respondents |
|--|-------|---------------------------------|
| Listed below are a number of business support providers. For each of these please indicate the level of service you have had in dealing with them. If you have never had contact with them please indicate this.: Community Futures | | |
| Excellent | 23 | 16.31% |
| Good | 29 | 20.57% |
| Fair | 4 | 2.84% |
| Poor | 6 | 4.26% |
| Unable to assist | 15 | 10.64% |
| Not applicable | 64 | 45.39% |
| Total | 141 | |

Survey Participants: 609
Question Respondents: 141
No Response Count: 468
Response Rate: 23%

| | Count | Percent of Question Respondents |
|---|-------|---------------------------------|
| Listed below are a number of business support providers. For each of these please indicate the level of service you have had in dealing with them. If you have never had contact with them please indicate this.: Economic Development Organization / Commission | | |
| Excellent | 12 | 9.30% |
| Good | 22 | 17.05% |
| Fair | 11 | 8.53% |
| Poor | 13 | 10.08% |
| Unable to assist | 11 | 8.53% |
| Not applicable | 60 | 46.51% |
| Total | 129 | |

Survey Participants: 609
Question Respondents: 129
No Response Count: 480
Response Rate: 21%

| | Count | Percent of Question Respondents |
|---|-------|---------------------------------|
| Listed below are a number of business support providers. For each of these please indicate the level of service you have had in dealing with them. If you have never had contact with them please indicate this.: Innovation Councils (Kootenay Association for Science and Technology, Kootenay Rockies Innovation Council) | | |
| Excellent | 4 | 3.20% |
| Good | 10 | 8.00% |
| Fair | 4 | 3.20% |
| Poor | 2 | 1.60% |
| Unable to assist | 13 | 10.40% |
| Not applicable | 92 | 73.60% |
| Total | 125 | |

Survey Participants: 609
Question Respondents: 125
No Response Count: 484
Response Rate: 21%

| | Count | Percent of Question Respondents |
|--|-------|---------------------------------|
| Listed below are a number of business support providers. For each of these please indicate the level of service you have had in dealing with them. If you have never had contact with them please indicate this.: Basin Business Advisors (BBA) | | |
| Excellent | 6 | 4.65% |
| Good | 14 | 10.85% |
| Fair | 2 | 1.55% |
| Poor | 2 | 1.55% |
| Unable to assist | 15 | 11.63% |
| Not applicable | 90 | 69.77% |
| Total | 129 | |

Survey Participants: 609
 Question Respondents: 129
 No Response Count: 480
 Response Rate: 21%

| | Count | Percent of Question Respondents |
|--|-------|---------------------------------|
| Listed below are a number of business support providers. For each of these please indicate the level of service you have had in dealing with them. If you have never had contact with them please indicate this.: College Continuing Education and Workforce Training | | |
| Excellent | 11 | 8.03% |
| Good | 43 | 31.39% |
| Fair | 16 | 11.68% |
| Poor | 3 | 2.19% |
| Unable to assist | 10 | 7.30% |
| Not applicable | 54 | 39.42% |
| Total | 137 | |

Survey Participants: 609
 Question Respondents: 137
 No Response Count: 472
 Response Rate: 22%

| | Count | Percent of Question Respondents |
|---|-------|---------------------------------|
| Listed below are a number of business support providers. For each of these please indicate the level of service you have had in dealing with them. If you have never had contact with them please indicate this.: Kootenay Aboriginal Business Advocates Society | | |
| Good | 3 | 2.36% |
| Fair | 1 | 0.79% |
| Poor | 3 | 2.36% |
| Unable to assist | 14 | 11.02% |
| Not applicable | 106 | 83.46% |
| Total | 127 | |

Survey Participants: 609
Question Respondents: 127
No Response Count: 482
Response Rate: 21%

| | Count | Percent of Question Respondents |
|---|-------|---------------------------------|
| Listed below are a number of business support providers. For each of these please indicate the level of service you have had in dealing with them. If you have never had contact with them please indicate this.:Invest Kootenay | | |
| Excellent | 1 | 0.79% |
| Good | 3 | 2.36% |
| Fair | 2 | 1.57% |
| Poor | 2 | 1.57% |
| Unable to assist | 15 | 11.81% |
| Not applicable | 104 | 81.89% |
| Total | 127 | |

Survey Participants: 609
Question Respondents: 127
No Response Count: 482
Response Rate: 21%

| | Count | Percent of Question Respondents |
|---|-------|---------------------------------|
| Listed below are a number of business support providers. For each of these please indicate the level of service you have had in dealing with them. If you have never had contact with them please indicate this.: National Research Council Industrial Research Assistance Program | | |
| Excellent | 3 | 2.59% |
| Good | 3 | 2.59% |
| Poor | 1 | 0.86% |
| Unable to assist | 7 | 6.03% |
| Not applicable | 102 | 87.93% |
| Total | 116 | |

Survey Participants: 609
Question Respondents: 116
No Response Count: 493
Response Rate: 19%

| | Count | Percent of Question Respondents |
|---|-------|---------------------------------|
| Listed below are a number of business support providers. For each of these please indicate the level of service you have had in dealing with them. If you have never had contact with them please indicate this.: Scientific Research and Experimental Development Tax Incentive Program | | |
| Excellent | 2 | 1.74% |
| Good | 2 | 1.74% |
| Poor | 1 | 0.87% |
| Unable to assist | 8 | 6.96% |
| Not applicable | 102 | 88.70% |
| Total | 115 | |

Survey Participants: 609
Question Respondents: 115
No Response Count: 494

| | Count | Percent of Question Respondents |
|---|-------|---------------------------------|
| <p>Listed below are a number of business support providers. For each of these please indicate the level of service you have had in dealing with them. If you have never had contact with them please indicate this.:</p> <p style="text-align: center;">Scientific Research and Experimental Development Tax Incentive Program</p> | | |

Response Rate: 19%

| | Count | Percent of Question Respondents |
|---|-------|---------------------------------|
| <p>Listed below are a number of business support providers. For each of these please indicate the level of service you have had in dealing with them. If you have never had contact with them please indicate this.:</p> <p style="text-align: center;">College Industry Liaison Officer</p> | | |
| Excellent | 13 | 10.16% |
| Good | 25 | 19.53% |
| Fair | 3 | 2.34% |
| Poor | 2 | 1.56% |
| Unable to assist | 7 | 5.47% |
| Not applicable | 78 | 60.94% |
| Total | 128 | |

Survey Participants: 609
 Question Respondents: 128
 No Response Count: 481
 Response Rate: 21%

| | Count | Percent of Question Respondents |
|--|-------|---------------------------------|
| | | |

| Listed below are a number of business support providers. For each of these please indicate the level of service you have had in dealing with them. If you have never had contact with them please indicate this. | Listed below are a number of business support providers. For each of these please indicate the level of service you have had in dealing with them. If you have never had contact with them please indicate this.: Other | | |
|--|---|--|---------|
| Excellent | CBT | 1 | 4.35% |
| | CBT - Student Workers | 1 | 4.35% |
| | CBT / College Funded work program | 1 | 4.35% |
| | CBT Employment | 1 | 4.35% |
| | CBT: Columbia Kootenay Cultural Alliance - art program | 1 | 4.35% |
| | Columbia Basin Trust | 1 | 4.35% |
| | Columbia Valley Credit Union | 1 | 4.35% |
| | Employment Center | 1 | 4.35% |
| | KC | 1 | 4.35% |
| | RE | 1 | 4.35% |
| | The Mayor | 1 | 4.35% |
| | Town of Golden | 2 | 8.70% |
| | Fair | Forest Renvelal Services of B.C | 1 |
| Good | Federated Co-operatives Limited-headoffice | 1 | 4.35% |
| | HA | 1 | 4.35% |
| | Kootenay Rockies Tourism | 1 | 4.35% |
| | PG | 1 | 4.35% |
| Poor | None have contacted the business, nor has the business contacted them | 1 | 4.35% |
| | RDCK | 1 | 4.35% |
| | Skills training -Equipment operators mechanics | 1 | 4.35% |
| | Town of Golden - for broadband access | 1 | 4.35% |
| Unable to assist | what is Kootenay Rockies Innovation Council? | 1 | 4.35% |
| Total | | 23 | 100.00% |

Survey Participants: 609
Question Respondents: 23
No Response Count: 586

| | | Count | Percent of Question Respondents |
|---|--|-------|---------------------------------|
| Listed below are a number of business support providers. For each of these please indicate the level of service you have had in dealing with them. If you have never had contact with them please indicate this. | Listed below are a number of business support providers. For each of these please indicate the level of service you have had in dealing with them. If you have never had contact with them please indicate this.: Other | | |

Response Rate: 4%

| | | Count | Percent of Question Respondents |
|---|--|-------|---------------------------------|
| Listed below are a number of business support providers. For each of these please indicate the level of service you have had in dealing with them. If you have never had contact with them please indicate this. | Listed below are a number of business support providers. For each of these please indicate the level of service you have had in dealing with them. If you have never had contact with them please indicate this.: Other | | |
| Excellent | Canadian Government employment - student | 1 | 20.00% |
| | Golden Employment Centre | 1 | 20.00% |
| Good | Golden Tourism | 1 | 20.00% |
| | Teachers Association (RMDTA) | 1 | 20.00% |
| No Response | pr | 1 | 20.00% |
| Total | | 5 | 100.00% |

Survey Participants: 609

Question Respondents: 5

No Response Count: 604

Response Rate: 1%

BUSINESS COMPETITIVENESS

| Business competitiveness factors | Not applicable | % Not applicable | Not important at all or not very important | % Not important at all or not very important | Somewhat important, very important | % Somewhat important, very important | Respondents |
|--|----------------|------------------|--|--|------------------------------------|--------------------------------------|-------------|
| Access to exporting and international markets | 234 | 45.79% | 167 | 32.68% | 110 | 21.53% | 511 |
| Accessing capital | 91 | 17.91% | 140 | 27.56% | 277 | 54.53% | 508 |
| Add or change in business, products or services | 48 | 9.43% | 88 | 17.29% | 373 | 73.28% | 509 |
| Affordable shipping/freight | 80 | 15.75% | 80 | 15.75% | 348 | 68.50% | 508 |
| Availability of telecommunications infrastructure and services | 12 | 2.37% | 60 | 11.83% | 435 | 85.80% | 507 |
| Energy costs | 59 | 11.57% | 111 | 21.76% | 340 | 66.67% | 510 |
| Exchange rate for Canadian dollar | 104 | 20.43% | 124 | 24.36% | 281 | 55.21% | 509 |
| Expansion of workforce employees | 44 | 8.63% | 143 | 28.04% | 323 | 63.33% | 510 |
| Improvement business management | 40 | 8.08% | 72 | 14.55% | 383 | 77.37% | 495 |
| Improvement of customer services | 19 | 3.72% | 40 | 7.83% | 452 | 88.45% | 511 |
| Improving worker productivity | 43 | 8.43% | 84 | 16.47% | 383 | 75.10% | 510 |
| New market development locally | 37 | 7.23% | 76 | 14.84% | 399 | 77.93% | 512 |

| Business competitiveness factors | Not applicable | % Not applicable | Not important at all or not very important | % Not important at all or not very important | Somewhat important, very important | % Somewhat important, very important | Respondents |
|--|-----------------------|-------------------------|---|---|---|---|--------------------|
| New market development outside of region | 78 | 15.23% | 136 | 26.56% | 298 | 58.20% | 512 |
| New product research and development | 62 | 12.16% | 66 | 12.94% | 382 | 74.90% | 510 |
| Reliable air transportation | 149 | 29.33% | 175 | 34.45% | 184 | 36.22% | 508 |
| Strategic alliances (joining with other businesses to provide products/services) | 45 | 8.84% | 103 | 20.24% | 361 | 70.92% | 509 |
| Water/sewer availability | 142 | 28.06% | 121 | 23.91% | 243 | 48.02% | 506 |
| Water/sewer costs | 147 | 28.99% | 123 | 24.26% | 237 | 46.75% | 507 |
| Workforce skill development | 15 | 2.95% | 49 | 9.65% | 444 | 87.40% | 508 |
| Workplace health and safety | 47 | 9.23% | 87 | 17.09% | 375 | 73.67% | 509 |

Survey Participants: 609

| | Count | Percent of Question Respondents |
|---|-------|---------------------------------|
| Looking forward to the next five years, please indicate how important each of these factors will be in ensuring that this business will remain competitive. Specify <i>Other</i>: New product research and development | | |
| Very important | 230 | 45.10% |
| Somewhat important | 152 | 29.80% |
| Not very important | 46 | 9.02% |
| Not important at all | 20 | 3.92% |
| Not applicable | 62 | 12.16% |
| Total | 510 | |

Survey Participants: 609
Question Respondents: 510
No Response Count: 99
Response Rate: 84%

| | Count | Percent of Question Respondents |
|---|-------|---------------------------------|
| Looking forward to the next five years, please indicate how important each of these factors will be in ensuring that this business will remain competitive. Specify <i>Other</i>: New market development locally | | |
| Very important | 230 | 44.92% |
| Somewhat important | 169 | 33.01% |
| Not very important | 46 | 8.98% |
| Not important at all | 30 | 5.86% |
| Not applicable | 37 | 7.23% |
| Total | 512 | |

Survey Participants: 609
Question Respondents: 512
No Response Count: 97
Response Rate: 84%

| | Count | Percent of Question Respondents |
|---|-------|---------------------------------|
| Looking forward to the next five years, please indicate how important each of these factors will be in ensuring that this business will remain competitive. Specify <i>Other</i>: New market development outside of region | | |
| Very important | 150 | 29.30% |
| Somewhat important | 148 | 28.91% |
| Not very important | 84 | 16.41% |
| Not important at all | 52 | 10.16% |
| Not applicable | 78 | 15.23% |
| Total | 512 | |

Survey Participants: 609
Question Respondents: 512
No Response Count: 97
Response Rate: 84%

| | Count | Percent of Question Respondents |
|--|-------|---------------------------------|
| Looking forward to the next five years, please indicate how important each of these factors will be in ensuring that this business will remain competitive. Specify <i>Other</i>: Access to exporting and international markets | | |
| Very important | 65 | 12.72% |
| Somewhat important | 45 | 8.81% |
| Not very important | 82 | 16.05% |
| Not important at all | 85 | 16.63% |
| Not applicable | 234 | 45.79% |
| Total | 511 | |

Survey Participants: 609
Question Respondents: 511
No Response Count: 98
Response Rate: 84%

| | Count | Percent of Question Respondents |
|--|-------|---------------------------------|
| Looking forward to the next five years, please indicate how important each of these factors will be in ensuring that this business will remain competitive. Specify <i>Other</i>: Add or change in business, products or services | | |
| Very important | 162 | 31.83% |
| Somewhat important | 211 | 41.45% |
| Not very important | 58 | 11.39% |
| Not important at all | 30 | 5.89% |
| Not applicable | 48 | 9.43% |
| Total | 509 | |

Survey Participants: 609
Question Respondents: 509
No Response Count: 100
Response Rate: 84%

| | Count | Percent of Question Respondents |
|---|-------|---------------------------------|
| Looking forward to the next five years, please indicate how important each of these factors will be in ensuring that this business will remain competitive. Specify <i>Other</i>: Strategic alliances (joining with other businesses to provide products/services) | | |
| Very important | 165 | 32.42% |
| Somewhat important | 196 | 38.51% |
| Not very important | 72 | 14.15% |
| Not important at all | 31 | 6.09% |
| Not applicable | 45 | 8.84% |
| Total | 509 | |

Survey Participants: 609
Question Respondents: 509
No Response Count: 100
Response Rate: 84%

| | Count | Percent of Question Respondents |
|--|-------|---------------------------------|
| Looking forward to the next five years, please indicate how important each of these factors will be in ensuring that this business will remain competitive. Specify <i>Other</i>: Improving worker productivity | | |
| Very important | 209 | 40.98% |
| Somewhat important | 174 | 34.12% |
| Not very important | 64 | 12.55% |
| Not important at all | 20 | 3.92% |
| Not applicable | 43 | 8.43% |
| Total | 510 | |

Survey Participants: 609
Question Respondents: 510
No Response Count: 99
Response Rate: 84%

| | Count | Percent of Question Respondents |
|---|-------|---------------------------------|
| Looking forward to the next five years, please indicate how important each of these factors will be in ensuring that this business will remain competitive. Specify <i>Other</i>: Expansion of workforce employees | | |
| Very important | 137 | 26.86% |
| Somewhat important | 186 | 36.47% |
| Not very important | 97 | 19.02% |
| Not important at all | 46 | 9.02% |
| Not applicable | 44 | 8.63% |
| Total | 510 | |

Survey Participants: 609
Question Respondents: 510
No Response Count: 99
Response Rate: 84%

| | Count | Percent of Question Respondents |
|--|-------|---------------------------------|
| Looking forward to the next five years, please indicate how important each of these factors will be in ensuring that this business will remain competitive. Specify <i>Other</i>: Workplace health and safety | | |
| Very important | 265 | 52.06% |
| Somewhat important | 110 | 21.61% |
| Not very important | 60 | 11.79% |
| Not important at all | 27 | 5.30% |
| Not applicable | 47 | 9.23% |
| Total | 509 | |

Survey Participants: 609
Question Respondents: 509
No Response Count: 100
Response Rate: 84%

| | Count | Percent of Question Respondents |
|--|-------|---------------------------------|
| Looking forward to the next five years, please indicate how important each of these factors will be in ensuring that this business will remain competitive. Specify <i>Other</i>: Workforce skill development | | |
| Very important | 283 | 55.71% |
| Somewhat important | 161 | 31.69% |
| Not very important | 36 | 7.09% |
| Not important at all | 13 | 2.56% |
| Not applicable | 15 | 2.95% |
| Total | 508 | |

Survey Participants: 609
Question Respondents: 508
No Response Count: 101
Response Rate: 83%

| | Count | Percent of Question Respondents |
|---|-------|---------------------------------|
| Looking forward to the next five years, please indicate how important each of these factors will be in ensuring that this business will remain competitive. Specify <i>Other</i>: Energy costs | | |
| Very important | 199 | 39.02% |
| Somewhat important | 141 | 27.65% |
| Not very important | 70 | 13.73% |
| Not important at all | 41 | 8.04% |
| Not applicable | 59 | 11.57% |
| Total | 510 | |

Survey Participants: 609
Question Respondents: 510
No Response Count: 99
Response Rate: 84%

| | Count | Percent of Question Respondents |
|---|-------|---------------------------------|
| Looking forward to the next five years, please indicate how important each of these factors will be in ensuring that this business will remain competitive. Specify <i>Other</i>: Water/sewer availability | | |
| Very important | 164 | 32.41% |
| Somewhat important | 79 | 15.61% |
| Not very important | 71 | 14.03% |
| Not important at all | 50 | 9.88% |
| Not applicable | 142 | 28.06% |
| Total | 506 | |

Survey Participants: 609
Question Respondents: 506
No Response Count: 103
Response Rate: 83%

| | Count | Percent of Question Respondents |
|--|-------|---------------------------------|
| Looking forward to the next five years, please indicate how important each of these factors will be in ensuring that this business will remain competitive. Specify <i>Other</i>: Water/sewer costs | | |
| Very important | 138 | 27.22% |
| Somewhat important | 99 | 19.53% |
| Not very important | 71 | 14.00% |
| Not important at all | 52 | 10.26% |
| Not applicable | 147 | 28.99% |
| Total | 507 | |

Survey Participants: 609
Question Respondents: 507
No Response Count: 102
Response Rate: 83%

| | Count | Percent of Question Respondents |
|--|-------|---------------------------------|
| Looking forward to the next five years, please indicate how important each of these factors will be in ensuring that this business will remain competitive. Specify <i>Other</i>: Reliable air transportation | | |
| Very important | 95 | 18.70% |
| Somewhat important | 89 | 17.52% |
| Not very important | 99 | 19.49% |
| Not important at all | 76 | 14.96% |
| Not applicable | 149 | 29.33% |
| Total | 508 | |

Survey Participants: 609
Question Respondents: 508
No Response Count: 101
Response Rate: 83%

| | Count | Percent of Question Respondents |
|--|-------|---------------------------------|
| Looking forward to the next five years, please indicate how important each of these factors will be in ensuring that this business will remain competitive. Specify <i>Other</i>: Affordable shipping/freight | | |
| Very important | 253 | 49.80% |
| Somewhat important | 95 | 18.70% |
| Not very important | 49 | 9.65% |
| Not important at all | 31 | 6.10% |
| Not applicable | 80 | 15.75% |
| Total | 508 | |

Survey Participants: 609
Question Respondents: 508
No Response Count: 101
Response Rate: 83%

| | Count | Percent of Question Respondents |
|---|-------|---------------------------------|
| Looking forward to the next five years, please indicate how important each of these factors will be in ensuring that this business will remain competitive. Specify <i>Other</i>: Improvement of customer services | | |
| Very important | 298 | 58.32% |
| Somewhat important | 154 | 30.14% |
| Not very important | 30 | 5.87% |
| Not important at all | 10 | 1.96% |
| Not applicable | 19 | 3.72% |
| Total | 511 | |

Survey Participants: 609
Question Respondents: 511
No Response Count: 98
Response Rate: 84%

| | Count | Percent of Question Respondents |
|---|-------|---------------------------------|
| Looking forward to the next five years, please indicate how important each of these factors will be in ensuring that this business will remain competitive. Specify <i>Other</i>: Availability of telecommunications infrastructure and services | | |
| Very important | 316 | 62.33% |
| Somewhat important | 119 | 23.47% |
| Not very important | 42 | 8.28% |
| Not important at all | 18 | 3.55% |
| Not applicable | 12 | 2.37% |
| Total | 507 | |

Survey Participants: 609
Question Respondents: 507
No Response Count: 102
Response Rate: 83%

| | Count | Percent of Question Respondents |
|--|-------|---------------------------------|
| Looking forward to the next five years, please indicate how important each of these factors will be in ensuring that this business will remain competitive. Specify <i>Other</i>: Exchange rate for Canadian dollar | | |
| Very important | 150 | 29.47% |
| Somewhat important | 131 | 25.74% |
| Not very important | 81 | 15.91% |
| Not important at all | 43 | 8.45% |
| Not applicable | 104 | 20.43% |
| Total | 509 | |

Survey Participants: 609
Question Respondents: 509
No Response Count: 100
Response Rate: 84%

| | Count | Percent of Question Respondents |
|--|-------|---------------------------------|
| Looking forward to the next five years, please indicate how important each of these factors will be in ensuring that this business will remain competitive. Specify <i>Other</i>: Accessing capital | | |
| Very important | 132 | 25.98% |
| Somewhat important | 145 | 28.54% |
| Not very important | 85 | 16.73% |
| Not important at all | 55 | 10.83% |
| Not applicable | 91 | 17.91% |
| Total | 508 | |

Survey Participants: 609
 Question Respondents: 508
 No Response Count: 101
 Response Rate: 83%

| | Count | Percent of Question Respondents |
|--|-------|---------------------------------|
| Looking forward to the next five years, please indicate how important each of these factors will be in ensuring that this business will remain competitive. Specify <i>Other</i>: Improvement business management | | |
| Very important | 199 | 40.20% |
| Somewhat important | 184 | 37.17% |
| Not very important | 51 | 10.30% |
| Not important at all | 21 | 4.24% |
| Not applicable | 40 | 8.08% |
| Total | 495 | |

Survey Participants: 609
 Question Respondents: 495
 No Response Count: 114
 Response Rate: 81%

| | | Count | Percent of Question Respondents |
|--|---|-------|---------------------------------|
| Looking forward to the next five years, please indicate how important each of these factors will be in ensuring that this business will remain competitive. Specify <i>Other</i> | Looking forward to the next five years, please indicate how important each of these factors will be in ensuring that this business will remain competitive. Specify <i>Other: Other</i> | | |
| Somewhat important | Access to grants | 1 | 1.25% |
| | Cost of technology | 1 | 1.25% |
| | Ferry Service affects client base substantially getting goods to market | 1 | 1.25% |
| | Financing Rates | 1 | 1.25% |
| | Industrial Park | 1 | 1.25% |
| | PH &H debit system required for gov't sales | 1 | 1.25% |
| | Power Outages - happen to often and last too long | 1 | 1.25% |
| | Power Outages really affect business cannot open customers affected. | 1 | 1.25% |
| | Stable Ferry Service | 1 | 1.25% |
| | access to local technology suppliers | 1 | 1.25% |
| Very important | # of people in community | 1 | 1.25% |
| | Ability to access the most recent films | 1 | 1.25% |
| | Access to broadband | 1 | 1.25% |
| | Availability of staff | 1 | 1.25% |
| | Build a bridge get rid of Ferry | 1 | 1.25% |
| | Continuity with local gov't | 1 | 1.25% |
| | Diesel & propane costs | 1 | 1.25% |
| | Economic development of the West Kootenay area. | 1 | 1.25% |
| | Ferry Service - needs to be reliable during peak summer period | 1 | 1.25% |

| | | Count | Percent of Question Respondents |
|--|---|-------|---------------------------------|
| Looking forward to the next five years, please indicate how important each of these factors will be in ensuring that this business will remain competitive. Specify <i>Other</i> | Looking forward to the next five years, please indicate how important each of these factors will be in ensuring that this business will remain competitive. Specify <i>Other: Other</i> | | |
| | Ferry Service -we depend on tourist season to make our living | 1 | 1.25% |
| | Ferry Service must be consistant, delays add to cost of shipments | 1 | 1.25% |
| | Ferry Service needs to be stable long delays cost money for freight and frustrate tourists | 1 | 1.25% |
| | Ferry Service- community needs reliability | 6 | 7.50% |
| | Ferry System - affects delivery of goods to area and the tourist who we depend on | 1 | 1.25% |
| | Ferry System needs to remain reliable backups in peak periods really affect the transport business | 1 | 1.25% |
| | Ferry System vital for delivery of food products delays are costly | 1 | 1.25% |
| | Ferry service during peak seasons must be maintained | 1 | 1.25% |
| | Ferry system delays affect bottom line increases freight costs when delayed. | 1 | 1.25% |
| | Ferry system during peak periods must remain stable | 1 | 1.25% |
| | Ferry system must be reliable during peak periods | 1 | 1.25% |
| | Ferry system must be reliable in peak summer periods | 1 | 1.25% |
| | Ferry system must remain reliable | 1 | 1.25% |

| | | Count | Percent of Question Respondents |
|---|--|-------|---------------------------------|
| <p>Looking forward to the next five years, please indicate how important each of these factors will be in ensuring that this business will remain competitive. Specify <i>Other</i></p> | <p>Looking forward to the next five years, please indicate how important each of these factors will be in ensuring that this business will remain competitive. Specify <i>Other</i>: Other</p> | | |
| | <p>hugely important for the transportation and cost of delivering goo</p> | | |
| | <p>Ferry system needs to be utilized in the best way possible.</p> | 1 | 1.25% |
| | <p>Fibre Optic Internet</p> | 1 | 1.25% |
| | <p>First impression staff and building</p> | 1 | 1.25% |
| | <p>Funding / Local government support</p> | 1 | 1.25% |
| | <p>Gap in skills and available people</p> | 1 | 1.25% |
| | <p>Growth in local community</p> | 1 | 1.25% |
| | <p>Growth of Community</p> | 1 | 1.25% |
| | <p>Improvement in tourism infrastructure</p> | 1 | 1.25% |
| | <p>Inustrial Park needed for expansion</p> | 1 | 1.25% |
| | <p>Municipal process (permits, development red tape)</p> | 1 | 1.25% |
| | <p>Positive economic climate</p> | 1 | 1.25% |
| | <p>Power Outages - too many to frequent greatly affect ability to work must shut down.</p> | 1 | 1.25% |
| | <p>Power Outages affect business especially in summer peak months</p> | 1 | 1.25% |
| | <p>Power Outages affect business substantially too many to often</p> | 1 | 1.25% |
| | <p>Power Outages greatly affect business</p> | 1 | 1.25% |

| | | Count | Percent of Question Respondents |
|--|---|-------|---------------------------------|
| Looking forward to the next five years, please indicate how important each of these factors will be in ensuring that this business will remain competitive. Specify <i>Other</i> | Looking forward to the next five years, please indicate how important each of these factors will be in ensuring that this business will remain competitive. Specify <i>Other: Other</i> | | |
| | Power Outages of any kind especially in Peak Summer periods very bad for business . | 1 | 1.25% |
| | Power Outages really affect | 2 | 2.50% |
| | Power Outages to many to frequent | 1 | 1.25% |
| | Power Outages- any season greatly affect bottom line to many of them | 1 | 1.25% |
| | Power outages happen too often and last too long. | 1 | 1.25% |
| | Raw Material costs | 1 | 1.25% |
| | Reliable Shipping/freight | 1 | 1.25% |
| | Retail location costs | 1 | 1.25% |
| | Road Transportation / Hwy 1 Improvements | 1 | 1.25% |
| | Skilled labour attraction and retention | 1 | 1.25% |
| | Structural and asset improvements | 1 | 1.25% |
| | Succession Planning | 1 | 1.25% |
| | Technology | 1 | 1.25% |
| | Town Council open-minded about business possibilities | 1 | 1.25% |
| | Town of Golden being interested in business success | 1 | 1.25% |
| | Up keep of local trails & resort trails for biking | 1 | 1.25% |
| | availability of skilled workers | 1 | 1.25% |
| | available workers and affordable | 1 | 1.25% |

| | | Count | Percent of Question Respondents |
|--|---|-------|---------------------------------|
| Looking forward to the next five years, please indicate how important each of these factors will be in ensuring that this business will remain competitive. Specify <i>Other</i> | Looking forward to the next five years, please indicate how important each of these factors will be in ensuring that this business will remain competitive. Specify <i>Other: Other</i> | | |
| | rates | | |
| | commercial lending is key to business success | 1 | 1.25% |
| | government recognition of regional colleges to small communities | 1 | 1.25% |
| | group advertisement - putting ND on map | 1 | 1.25% |
| | improve workplace technology/equipment | 1 | 1.25% |
| | need more people in area | 1 | 1.25% |
| | road access | 1 | 1.25% |
| | skilled labour available | 1 | 1.25% |
| | staff training | 1 | 1.25% |
| | viability of the community | 1 | 1.25% |
| Total | | 80 | 100.00% |

Survey Participants: 609
Question Respondents: 80
No Response Count: 529
Response Rate: 13%

| | | Count | Percent of Question Respondents |
|--|---|-------------------------------|---------------------------------|
| Looking forward to the next five years, please indicate how important each of these factors will be in ensuring that this business will remain competitive. Specify <i>Other</i> | Looking forward to the next five years, please indicate how important each of these factors will be in ensuring that this business will remain competitive. Specify <i>Other: Other</i> | | |
| Not very important | Poweroutages- greatly affect productivity | 1 | 2.70% |
| Somewhat important | Access to skilled labour | 1 | 2.70% |
| | Ferry Service must be maintained as this is how the tourists get here. | 1 | 2.70% |
| | Ferry System backlogs affect wether or not someone will stop and shop | 1 | 2.70% |
| | POWER OUTAGES - way to often we pay high energy costs and get nothing for it. | 1 | 2.70% |
| | POWER Outages in summer months affect our bottom line for the year | 1 | 2.70% |
| | Power Outages - hard to do business when power is out to many to often | 1 | 2.70% |
| | Power Outages too many very costly for business | 1 | 2.70% |
| | Power Outages-to many and too frequent loose money when we cannot service our clients | 1 | 2.70% |
| | access to local marketing suppliers | 1 | 2.70% |
| | Very important | Community supports recreation | 1 |
| Development | | 1 | 2.70% |
| FTE's (full time equivilents) grant managment process challenging and v important | | 1 | 2.70% |
| Fe | | 1 | 2.70% |

| | | Count | Percent of Question Respondents |
|--|---|-------|---------------------------------|
| Looking forward to the next five years, please indicate how important each of these factors will be in ensuring that this business will remain competitive. Specify <i>Other</i> | Looking forward to the next five years, please indicate how important each of these factors will be in ensuring that this business will remain competitive. Specify <i>Other: Other</i> | | |
| | Ferry | 1 | 2.70% |
| | Ferry Service | 1 | 2.70% |
| | Ferry Service less delays | 1 | 2.70% |
| | Ferry delays affect delivery of products and increase costs | 1 | 2.70% |
| | Ferry system needs to be reliable for tourist season | 1 | 2.70% |
| | Heavy taxes & fuel in BC | 1 | 2.70% |
| | Industrial Park - need more areas in community for businesses | 1 | 2.70% |
| | Industrial Park to attract new businesses | 1 | 2.70% |
| | POWER OUTAGES - huge affect to many and to often | 1 | 2.70% |
| | POWER OUTAGES greatly affect our business | 1 | 2.70% |
| | Power Outages - during summer peak tourist season greatly affect business | 1 | 2.70% |
| | Power Outages affect customers directly, store closed, loose business | 1 | 2.70% |
| | Power Outages too many and too frequent have to close store | 1 | 2.70% |
| | Power Outages too many very costly for business | 2 | 5.41% |
| | Power Outages- way to many during summer peak periods. | 1 | 2.70% |

| | | Count | Percent of Question Respondents |
|--|---|-------|---------------------------------|
| Looking forward to the next five years, please indicate how important each of these factors will be in ensuring that this business will remain competitive. Specify <i>Other</i> | Looking forward to the next five years, please indicate how important each of these factors will be in ensuring that this business will remain competitive. Specify <i>Other: Other</i> | | |
| | Power outages | 1 | 2.70% |
| | Power outages during peak season affect bottom line | 1 | 2.70% |
| | economic development of area | 1 | 2.70% |
| | highway signage | 1 | 2.70% |
| | highway signage for business centre | 1 | 2.70% |
| | streamlining permit process | 1 | 2.70% |
| | training facilitator in high school | 1 | 2.70% |
| Total | | 37 | 100.00% |

Survey Participants: 609
Question Respondents: 37
No Response Count: 572
Response Rate: 6%

| | | Count | Percent of Question Respondents |
|---|--|-------|---------------------------------|
| Looking forward to the next five years, please indicate how important each of these factors will be in ensuring that this business will remain competitive. Specify <i>Other</i> | Looking forward to the next five years, please indicate how important each of these factors will be in ensuring that this business will remain competitive. Specify <i>Other</i>: Other | | |
| Somewhat important | Airport landing strip would help us a lot for delivery of goods as KalTire has a cargo plane | 1 | 7.69% |
| | Ferry system important to business needs to be reliable | 1 | 7.69% |
| | Industrial Park to encourage new businesses | 1 | 7.69% |
| | Large Vehicles parking in front of business blocking access | 1 | 7.69% |
| | Loarge vehicles parked in front of business blocks access | 1 | 7.69% |
| | Parking large vehicles parking in front of store block entrance | 1 | 7.69% |
| | Parking of large vehicles in front of businesses no access to the businesses | 1 | 7.69% |
| Very important | Bike Trail - maintenance & upkeep | 1 | 7.69% |
| | Chamber of Commerce | 1 | 7.69% |
| | Industrial Park | 1 | 7.69% |
| | Influx of new people | 1 | 7.69% |
| | Power outages | 1 | 7.69% |
| | Tech school training at high school level | 1 | 7.69% |
| Total | | 13 | 100.00% |

Survey Participants: 609
Question Respondents: 13
No Response Count: 596
Response Rate: 2%

PRODUCTIVITY DRIVERS

| Performance of key productivity drivers | Not Applicable | % Not Applicable | Poor | % Poor | Fair | % Fair | Good | % Good | Excellent | % Excellent | Respondents |
|---|----------------|------------------|------|--------|------|--------|------|--------|-----------|-------------|-------------|
| Innovation & the use of technology | 23 | 5.39% | 9 | 2.11% | 88 | 20.61% | 181 | 42.39% | 126 | 29.51% | 427 |
| Investing in people and skills | 37 | 8.69% | 11 | 2.58% | 75 | 17.61% | 192 | 45.07% | 111 | 26.06% | 426 |
| Leadership and management capacity | 14 | 3.27% | 4 | 0.93% | 36 | 8.41% | 240 | 56.07% | 134 | 31.31% | 428 |
| Measuring impact of productivity efforts/ investments | 70 | 16.51% | 22 | 5.19% | 107 | 25.24% | 163 | 38.44% | 62 | 14.62% | 424 |
| Networking and collaboration with other businesses | 35 | 8.22% | 24 | 5.63% | 99 | 23.24% | 174 | 40.85% | 94 | 22.07% | 426 |
| Organizing work (structures & processes) | 33 | 7.80% | 3 | 0.71% | 70 | 16.55% | 220 | 52.01% | 97 | 22.93% | 423 |
| Productive workplace culture | 15 | 3.50% | 1 | 0.23% | 31 | 7.24% | 250 | 58.41% | 131 | 30.61% | 428 |

Survey Participants: 609

PRODUCTIVITY DRIVERS

| | Count | Percent of Question Respondents |
|--|-------|---------------------------------|
| Please rate the following productivity drivers.: Leadership and management capacity | | |
| Excellent | 134 | 31.31% |
| Good | 240 | 56.07% |
| Fair | 36 | 8.41% |
| Poor | 4 | 0.93% |
| Not applicable | 14 | 3.27% |
| Total | 428 | |

Survey Participants: 609
 Question Respondents: 428
 No Response Count: 181
 Response Rate: 70%

| | Count | Percent of Question Respondents |
|--|-------|---------------------------------|
| Please rate the following productivity drivers.: Productive workplace culture | | |
| Excellent | 131 | 30.61% |
| Good | 250 | 58.41% |
| Fair | 31 | 7.24% |
| Poor | 1 | 0.23% |
| Not applicable | 15 | 3.50% |
| Total | 428 | |

Survey Participants: 609
 Question Respondents: 428
 No Response Count: 181
 Response Rate: 70%

| | Count | Percent of Question Respondents |
|--|-------|---------------------------------|
| Please rate the following productivity drivers.: Innovation & the use of technology | | |
| Excellent | 126 | 29.51% |
| Good | 181 | 42.39% |
| Fair | 88 | 20.61% |
| Poor | 9 | 2.11% |
| Not applicable | 23 | 5.39% |
| Total | 427 | |

Survey Participants: 609
Question Respondents: 427
No Response Count: 182
Response Rate: 70%

| | Count | Percent of Question Respondents |
|--|-------|---------------------------------|
| Please rate the following productivity drivers.: Investing in people and skills | | |
| Excellent | 111 | 26.06% |
| Good | 192 | 45.07% |
| Fair | 75 | 17.61% |
| Poor | 11 | 2.58% |
| Not applicable | 37 | 8.69% |
| Total | 426 | |

Survey Participants: 609
Question Respondents: 426
No Response Count: 183
Response Rate: 70%

| | Count | Percent of Question Respondents |
|--|-------|---------------------------------|
| Please rate the following productivity drivers.: Organizing work (structures & processes) | | |
| Excellent | 97 | 22.93% |
| Good | 220 | 52.01% |
| Fair | 70 | 16.55% |
| Poor | 3 | 0.71% |
| Not applicable | 33 | 7.80% |
| Total | 423 | |

Survey Participants: 609
Question Respondents: 423
No Response Count: 186
Response Rate: 69%

| | Count | Percent of Question Respondents |
|--|-------|---------------------------------|
| Please rate the following productivity drivers.: Networking and collaboration with other businesses | | |
| Excellent | 94 | 22.07% |
| Good | 174 | 40.85% |
| Fair | 99 | 23.24% |
| Poor | 24 | 5.63% |
| Not applicable | 35 | 8.22% |
| Total | 426 | |

Survey Participants: 609
Question Respondents: 426
No Response Count: 183
Response Rate: 70%

| | Count | Percent of Question Respondents |
|---|--------------|--|
| Please rate the following productivity drivers.: Measuring impact of productivity efforts/ investments | | |
| Excellent | 62 | 14.62% |
| Good | 163 | 38.44% |
| Fair | 107 | 25.24% |
| Poor | 22 | 5.19% |
| Not applicable | 70 | 16.51% |
| Total | 424 | |

Survey Participants: 609
Question Respondents: 424
No Response Count: 185
Response Rate: 70%

ECONOMIC DRIVERS

| | Count | Percent of Question Respondents |
|---|-------|---------------------------------|
| Please indicate which economic drivers have the greatest potential for growth in the region over the next 5 to 10 years. (please pick top 3) | | |
| Finance | 3 | 0.60% |
| Government | 7 | 1.39% |
| Education | 38 | 7.54% |
| Agriculture | 45 | 8.93% |
| Other niche service businesses (e.g. services to seniors) | 55 | 10.91% |
| Green or environmental businesses | 74 | 14.68% |
| Arts | 83 | 16.47% |
| culture and creative businesses | 83 | 16.47% |
| Manufacturing | 102 | 20.24% |
| Construction | 114 | 22.62% |
| Health & wellness | 117 | 23.21% |
| Forestry | 136 | 26.98% |
| Technology-based businesses | 151 | 29.96% |
| Relocation of people from urban centres | 169 | 33.53% |
| Tourism | 331 | 65.67% |
| Other | 152 | 30.16% |
| Total | 1660 | |

| | |
|-----------------------|-----|
| Survey Participants: | 609 |
| Question Respondents: | 504 |
| No Response Count: | 105 |
| Response Rate: | 83% |

| | Count | Percent of Question Respondents |
|---|-------|---------------------------------|
| Please indicate which economic drivers have the greatest potential for growth in the region over the next 5 to 10 years. (please pick top 3): If <i>Other</i> please specify | | |
| Battery manufacturing | 1 | 0.20% |
| Building beautification | 1 | 0.20% |
| Health and Wellness | 1 | 0.20% |
| Hi-Tech | 1 | 0.20% |
| Manufacturing | 1 | 0.20% |
| Pulp | 1 | 0.20% |
| Agriculture | 2 | 0.40% |
| Fresh water | 2 | 0.40% |
| Hospitality | 2 | 0.40% |
| Recreation | 2 | 0.40% |
| Retail | 2 | 0.40% |
| Senior services | 3 | 0.60% |
| Transportation | 3 | 0.60% |
| Hydroelectricity | 4 | 0.79% |
| Recycling | 4 | 0.79% |
| Mining | 70 | 13.89% |
| Total | 100 | |

| | |
|--------------------------------------|-----|
| Survey Participants: | 609 |
| Question Respondents: | 103 |
| No Response Count: | 49 |
| Parent Question 'Other' Respondents: | 152 |
| Parent Question Respondents: | 504 |
| Response Rate: | 68% |

PROXIMITY TO ALBERTA

| | Count | Percent of Question Respondents |
|--|------------|---------------------------------|
| Is your business impacted by its proximity to the Alberta border? | | |
| Yes | 75 | 65.79% |
| No | 39 | 34.21% |
| Total | 114 | |

| | |
|-----------------------|-----|
| Survey Participants: | 609 |
| Question Respondents: | 114 |
| No Response Count: | 495 |
| Response Rate: | 19% |

| | Count | Percent of Question Respondents |
|--|-----------|---------------------------------|
| Is your business impacted by its proximity to the Alberta border?: If Yes, please explain | | |
| Positive - Access to large equipment | 1 | 1.37% |
| Positive - Alberta has higher recycling fees | 1 | 1.37% |
| Positive - Alberta workforce | 2 | 2.74% |
| Negative - Alberta competition | 3 | 4.11% |
| Positive - Alberta suppliers | 3 | 4.11% |
| Negative - Alberta has lower taxes | 5 | 6.85% |
| Negative - Loss of sales to Alberta | 13 | 17.81% |
| Positive - Alberta customers | 43 | 58.90% |
| Total | 71 | |

| | |
|------------------------------------|-----|
| Survey Participants: | 609 |
| Question Respondents: | 73 |
| No Response Count: | 2 |
| Parent Question 'Yes' Respondents: | 75 |
| Parent Question Respondents: | 114 |
| Response Rate: | 97% |

ASSESSMENT AND PLANS

OVERALL HEALTH

| | Count | Percent of Question Respondents |
|--|-------|---------------------------------|
| Rate the following: Facility's overall health | | |
| Excellent | 154 | 22.48% |
| Good | 398 | 58.10% |
| Fair | 105 | 15.33% |
| Poor | 22 | 3.21% |
| Not applicable | 6 | 0.88% |
| Total | 685 | |

Survey Participants: 795
 Question Respondents: 685
 No Response Count: 110
 Response Rate: 86%

| | Count | Percent of Question Respondents |
|---|-------|---------------------------------|
| Rate the following: Overall health of the parent company | | |
| Excellent | 71 | 11.62% |
| Good | 72 | 11.78% |
| Fair | 13 | 2.13% |
| Poor | 2 | 0.33% |
| Not applicable | 453 | 74.14% |
| Total | 611 | |

Survey Participants: 795
 Question Respondents: 611
 No Response Count: 184
 Response Rate: 77%

ATTITUDE TOWARD COMMUNITY

| | Count | Percent of Question Respondents |
|---|-------|---------------------------------|
| Rate the following: Local management's attitude toward the community | | |
| Excellent | 329 | 48.96% |
| Good | 257 | 38.24% |
| Fair | 56 | 8.33% |
| Poor | 7 | 1.04% |
| Not applicable | 23 | 3.42% |
| Total | 672 | |

Survey Participants: 795
 Question Respondents: 672
 No Response Count: 123
 Response Rate: 85%

| | Count | Percent of Question Respondents |
|--|-------|---------------------------------|
| Rate the following: Parent company's attitude towards the community | | |
| Excellent | 63 | 10.55% |
| Good | 70 | 11.73% |
| Fair | 11 | 1.84% |
| Poor | 13 | 2.18% |
| Not applicable | 440 | 73.70% |
| Total | 597 | |

Survey Participants: 795
 Question Respondents: 597
 No Response Count: 198
 Response Rate: 75%

RISK OF CLOSING OR DOWNSIZING

| | Count | Percent of Question Respondents |
|--|-------|---------------------------------|
| Rate the risk: Facility closing in the next 1 - 3 years | | |
| High | 25 | 3.50% |
| Moderate | 70 | 9.80% |
| Low | 619 | 86.69% |
| Total | 714 | |

Survey Participants: 795
 Question Respondents: 714
 No Response Count: 81
 Response Rate: 90%

| | Count | Percent of Question Respondents |
|---|-------|---------------------------------|
| Rate the risk: Facility downsizing in the next 1 - 3 years | | |
| High | 28 | 4.02% |
| Moderate | 77 | 11.06% |
| Low | 591 | 84.91% |
| Total | 696 | |

Survey Participants: 795
 Question Respondents: 696
 No Response Count: 99
 Response Rate: 88%